



How the world shares ideas.

Nortel Networks Symposium WebResponse Server Installation and Administration Guide

Product Release 2.0 Standard 1.0
October 1999



Nortel Networks Symposium WebResponse Server

Installation and Administration Guide

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How the world shares ideas.

Publication history

October 1999

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Chapter 1

Getting started

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Welcome

Introduction

Welcome to Nortel Networks Symposium WebResponse Server Release 2.0. Symposium WebResponse Server is part of Nortel Networks' Symposium suite of applications. This product allows you to receive, route, track, and respond to customer requests over the Internet.

Symposium WebResponse Server features

Multiple ways to respond to your customers' inquiries

Symposium WebResponse Server agents can respond to transaction requests through a variety of media, including callback responses, e-mail responses, fax responses, and Web Responses. The agent desktop software for Symposium WebResponse Server provides automation for these responses to eliminate repetitive actions such as addressing an e-mail or dialing a fax machine, which reduces agents' handling time, fatigue, boredom, and mistakes.

The agent client interface presents the agent with a browser-based graphical user interface. Agents can use it to respond to customers' requests over telephone, fax, or e-mail.

Reporting and real-time displays

Symposium WebResponse Server's reporting capabilities allow call center managers to have a complete view of both current and historic electronic inquiry activity. Historical reporting enables the call center supervisors to know not only the total number of messages, but also the number broken down into skillset, day, date, week, and so on. Real-time reporting capabilities allow both agents and supervisors to see the total number of new and pending requests as well as the number pending for each skillset.

Dynamic Transaction Handler

The Dynamic Transaction Handler (DTH) is the software component of the Symposium WebResponse Server that is responsible for managing customer requests over the Internet. DTH essentially converts web-based transaction information into ACD call data that the Symposium Call Center Server can process.

Once a customer submits a web-based request to the Symposium WebResponse Server, the DTH attaches a transaction number to the request, and then maps the customer-requested skillset to an existing ACD queue. This information is then stored in the Symposium WebResponse Server database.

The Data Miner

The Data Miner, a component of the DTH, scans the database for any new unprocessed transactions. Once the Data Miner finds a new transaction, it creates a TAPI call to the switch. The TAPI call, containing both the original web request and the DTH-added data is then blended into the call center's existing ACD call traffic. The call can then be presented to the appropriate agents' phoneset or PC.

About this guide

Distribution of this guide

This document is available only in electronic .pdf file format on the CD-ROM that is supplied with the Symposium WebResponse Server Release 2.0 software.

You can view this guide online using Acrobat Reader, or you can print the guide in whole or in part, for individual use.

Online Help

Symposium WebResponse Server Release 2.0 software provides the following online Help:

- Symposium WebResponse Server Release 2.0 Online Help for Administrators
- Symposium WebResponse Server Release 2.0 Online Help for Agents

Assumptions

This guide assumes that the following software is installed, configured, and working correctly:

- Nortel TAPI Service Provider
- Microsoft Exchange Server 5.0
- Internet Information Server 4.0

This guide does not provide installation or configuration instructions for these applications. For instructions, refer to the documentation that comes with these applications.

Additionally, this guide assumes that your switch and your agent PCs are configured for use with TAPI. For instructions, refer to your TAPI Service Provider documentation.

Who should read this guide

This guide is for system administrators and technical support personnel who are responsible for installing, configuring, and administering Symposium WebResponse Server.

Skills you need

To use this guide and Symposium WebResponse Server effectively, you must have experience with computers, telephony products, databases, the Internet, Windows NT, and Windows 95.

ATTENTION

Only qualified information systems personnel should perform maintenance and upgrading of this product.

Overview of Symposium WebResponse Server Release 2.0

Introduction

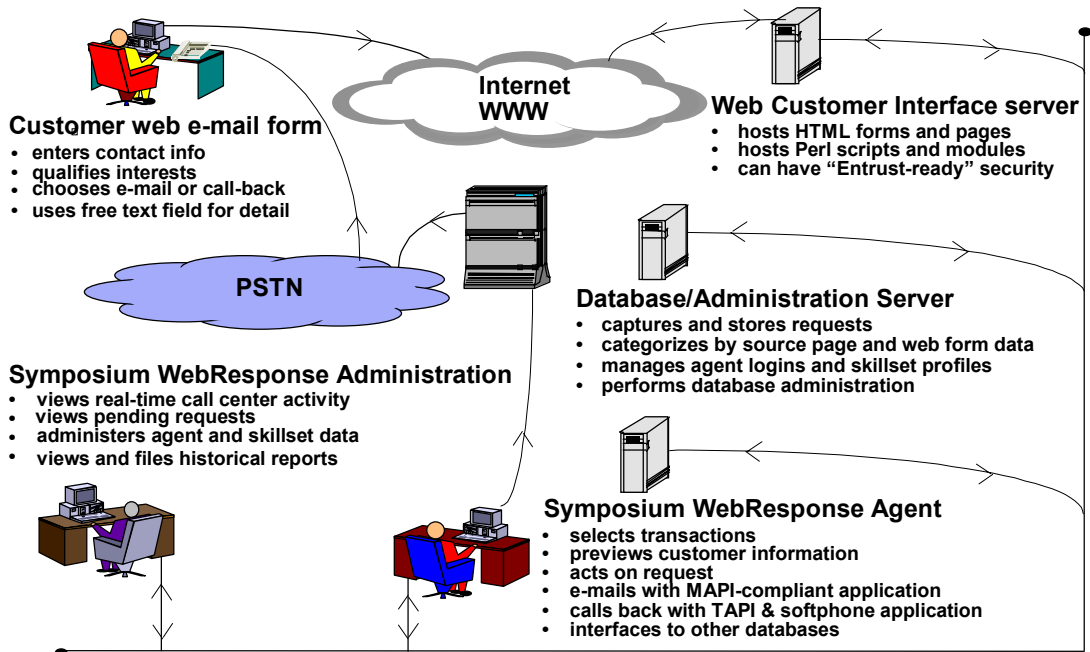
Nortel Networks Symposium WebResponse Server is a client/server call center application that expands call center e-mail capabilities to allow agents to view, respond to, and track requests from the Internet. Unlike conventional e-mail requests to a single e-mail account, Symposium WebResponse Server not only lists all of your customers' requests, but records all of your agents' responses with the initial request. This allows you to measure and control the volume of traffic from the Internet. Supervisors and administrators can view both real-time displays of call center activities as well as run historical reports.

System components

Symposium WebResponse Server includes five components:

- Symposium WebResponse Server Agent Interface. This component is installed on the web server. Agents use the Agent Interface to view and respond to requests from the web page.
- Symposium WebResponse Server Administrator. This component is installed on the database server or on a separate Windows NT workstation. Symposium WebResponse Administration provides administrative and management capabilities.
- Customer Interface. This component is set up on the web server. The Web Customer Interface customer receives the requests using a standard HTML form.
- Database/Administration Server. This component tracks all call center activity.
- Telephony Service. This component includes the Dynamic Transaction Handler (DTH) and the Data Miner. The Telephony service presents new transactions to agents.

Symposium WebResponse Server



System requirements

Introduction

The following section lists the minimum system requirements to successfully run Symposium WebResponse Server. For information on Sybase, TAPI, and e-mail systems, refer to the documentation that comes with these applications.

Note: The specifications below are minimum requirements only. Increase processor speed, RAM, and disk space to improve system performance.

Software on the Symposium WebResponse Server CD-ROM

The following software is available on the Nortel Networks Symposium WebResponse Server CD-ROM:

- Sybase Adaptive Server Enterprise 11.5
- Adobe Acrobat 3.0
- PC Anywhere
- Nortel Security (FlexLM License Manager)
- Windows Scripting Library 5.0 (in the utility software directory)
- MDAC 2.1 (in the utility software directory)
- Active Perl 5.02
- SybPerl

Software you provide

You must provide the following software:

- Windows NT Server 4.0
- Windows NT Workstation 4.0 (optional)
- NT Service Packs 3.0 and 4.0
- NT 4 Options Pack 4.0
- Internet Explorer 4.01

- TAPI Service Provider
- TAPI Client 2.1 for Windows 95
- MAPI e-mail system

ATTENTION

Install NT Option Pack 4 *before* you install Service Pack 4.0. If you install Option Pack 4 after Service Pack 4.0, you must reinstall Service Pack 4.0.

Symposium WebResponse Server Database

Install the Database component on the Symposium WebResponse Server Database server. Symposium WebResponse Server uses a Sybase database to store customer data, agent information, and call statistics.

Minimum hardware requirements

- Pentium 166 MHz processor
- 128 Mbytes of RAM
- 2 Gbytes of free disk space (additional disk space will be required for the database as information is added)
- LAN connection
- CD-ROM drive
- a modem if you are using pcANYWHERE32

Minimum software requirements

- Windows NT 4.0 with Service Pack 4.0 and Option Pack 4
- TCP/IP protocol
- Sybase Adaptive Server Enterprise (Sybase version 11.5, supplied on CD-ROM)
- MAPI-compliant e-mail client application (Microsoft Exchange 5.0 or Outlook), if installing Mail Monitors
- pcANYWHERE32 if your organization has purchased Nortel Networks external support services

- Nortel Networks TAPI Service Provider 2.1 for Meridian environments, or Symposium TAPI Driver for ICM for DMS Centrex and MSL-100 environments (required for telephony integration)

Symposium WebResponse Server Administrator

You can install the Administrator component on a separate PC or on the Database server PC. The administrator's PC must have Sybase Open Client and Microsoft ODBC Manager installed before you begin installation.

Minimum hardware requirements

- Pentium 133 MHz processor
- 32 Mbytes of RAM
- 30 Mbytes of free disk space
- LAN connection
- CD-ROM drive

Minimum software requirements

- Windows 95 OSR2 or Windows NT 4.0
- TCP/IP protocol
- Microsoft Internet Explorer 4.0
- Sybase Open Client System 11.5 (supplied on CD-ROM)
- MAPI-compliant e-mail client application (Microsoft Exchange 5.0 or Outlook), if installing Mail Monitors

Customer Interface

Install the Symposium WebResponse Server Customer Interface component on the external web server. It captures customers' web transactions and submits them to Symposium WebResponse Server. The external web server must be available to the Internet if customers are outside the internal intranet.

Minimum hardware requirements

- Pentium 166 MHz processor
- 64 Mbytes of RAM
- 2 Gbytes of free disk space
- CD-ROM drive
- LAN connection

Minimum software requirements

- Windows NT 4.0, Service Pack 4.0, and Option Pack 4
- TCP/IP protocol
- web server (this guide documents Microsoft Internet Information Server only)
- Sybase Open Client System 11.5 (supplied on CD-ROM)
- Active Perl and Sybperl (supplied on CD-ROM)

Agent Interface

You can install the Agent Interface component on a separate web server PC or on the same PC as the Customer Interface. This is the internal web server and does not have to be on the Internet, but it must be available on the internal Intranet to allow agents to connect to this server using their web browser. If the Agent Interface component is installed with the Customer Interface, then both sets of hardware and software requirements must be met.

Minimum hardware requirements

- Pentium 166 MHz processor
- 64 Mbytes of RAM
- 2 Gbytes of free disk space
- CD-ROM drive
- LAN connection

Minimum software requirements

- Windows NT 4.0, Service Pack 4.0, and Option Pack 4
- TCP/IP protocol
- Microsoft Internet Explorer 4.0 web browser
- Microsoft Internet Information Server 4.0, installed with Option Pack 4
- Sybase Open Client System 11.5 (supplied on CD-ROM)
- Windows Script Version 5.0 (supplied on CD-ROM)
- Microsoft Data Access Components 2.1 (supplied on CD-ROM)

Telephony Service

The Telephony Service component presents new transactions to the agents. It can be installed on a separate PC or on the same PC as the Customer Interface or the Agent Interface, or both. If the Telephony Service is installed with the Customer Interface or the Agent Interface, then all hardware and software requirements must be met.

ATTENTION

Do not install the Telephony Service on the same PC as the TAPI server. However, the Telephony Service and TAPI server must have the same domain name.

Minimum hardware requirements

- Pentium 166 MHz processor
- 64 Mbytes of RAM
- 1 Gbyte of free disk space
- LAN connection
- CD-ROM drive

Minimum software requirements

- Windows NT 4.0, Service Pack 4.0
- TCP/IP protocol
- Sybase Open Client System 11.5
- Microsoft Data Access Components 2.1 (supplied on CD-ROM)

Telephony Client on the agent PC

The Telephony Client component is the interface between the TAPI client and the Agent Interface. It is installed on each agent PC. (The Agent Interface is not installed on each agent PC. It is installed on the web server.)

Agent PCs must meet the following requirements:

Minimum hardware requirements

- Pentium 100 MHz processor
- 16 Mbytes of RAM
- 100 Mbytes of free disk space
- LAN connection
- 14-inch SVGA monitor with at least 640 x 480 resolution
- one of the following telephones may be required for some softphone applications: M2008, M2216, M2616; or MDT3110, MDT310, MDT3820. For more information, refer to the documentation that comes with your softphone application.
- MCA adapter or Communicator Card may be required for some softphone applications. For more information, refer to the documentation that comes with your softphone application.

Minimum software requirements

- Windows 95 or Windows NT 4.0
- TCP/IP protocol
- Microsoft Internet Explorer 4.0 web browser
- TAPI Desktop Monitor or other softphone application, if required for your call center
- Microsoft TAPI Client 2.1 for Windows 95 only, if using a softphone application.
Microsoft TAPI Client 2.1 is installed by default with Windows NT 4.0, Service Pack 4.0.

Mail Server

- Microsoft Exchange Server 5.0

For your mail server hardware requirements, refer to the supplier documentation.

Possible system configurations

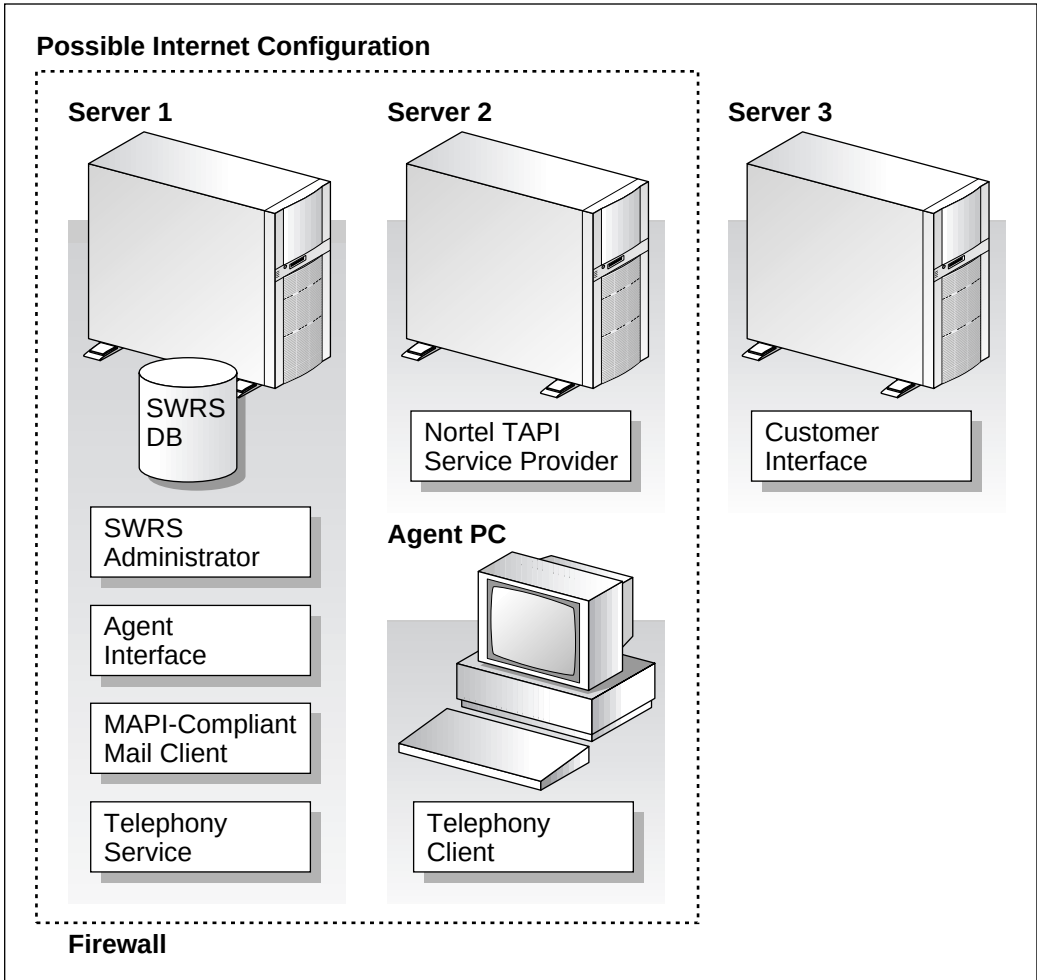
Introduction

The following diagrams show possible system configurations for Symposium WebResponse Server components—one for an intranet and one for an Internet setup.

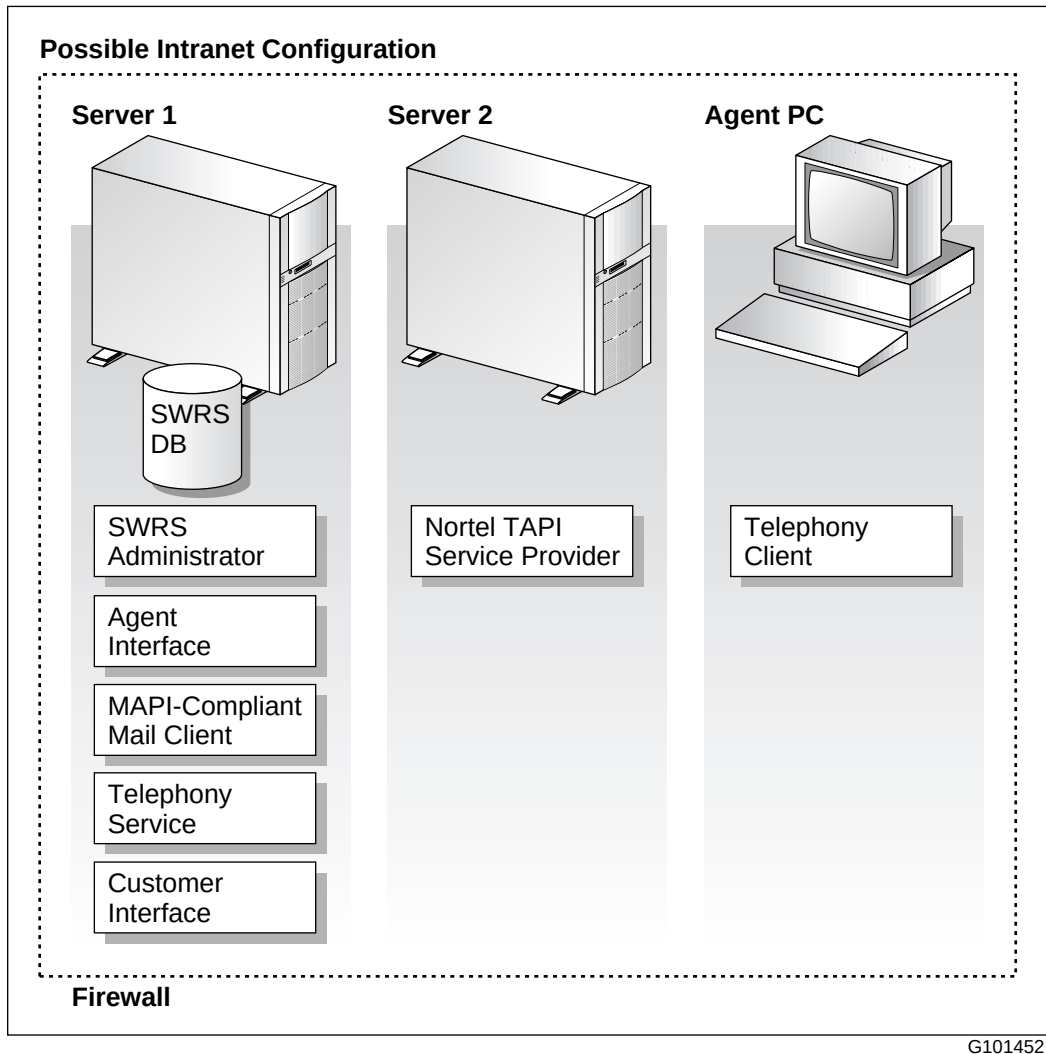
ATTENTION

Do not install the Telephony Service component on the same PC as the TAPI server.

Note: When you install any software, make sure to log on to Windows NT using the Administrator user ID.



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Chapter 2

Installing the server software

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Overview

Introduction

Before you install Symposium WebResponse Server, check that your system is set up according to the following list.

Pre-installation checklist

- Read the README.TXT file on your Symposium WebResponse Server CD-ROM. This file contains information that was not available when this guide was created.
- Check that your system hardware and software meet the minimum requirements for use with Symposium WebResponse Server. For more information, see “System requirements” on page 8.
- Check that Microsoft Internet Information Server 4.0 (IIS) is installed on the Symposium WebResponse Server, and that Microsoft Internet Explorer 4.0 is installed on the PC or PCs running the Agent Interface.
- Check that a web server (IIS or other) is installed on the Customer Interface.
- If you plan to use e-mail with Symposium WebResponse Server, ensure that the Symposium WebResponse Server has a MAPI-compliant e-mail client application installed.
- If you plan to use the DTH, ensure that the switch is programmed for use with the telephone using Symposium WebResponse Server, and that the TAPI Service Provider is installed and configured for use with Symposium WebResponse Server. For details, refer to your TAPI documentation.
- For agent PCs that run Windows 95, ensure that TAPI and the softphone application, if required, are installed and operational. During installation, you will require the IP addresses of the database server and the web server. A vacant CGI and RT Server port are also required. You can find the TAPI software at: <ftp://ftp.microsoft.com/developr/TAPI/TAPI2195.zip>.

Do not install components over a network

Do not install Symposium WebResponse Server components over a network. If necessary, copy the component installation directory to the local hard drive of the PC, and run the setup from the hard drive.

For example, if you need to install the Administrator component, but do have access to the CD-ROM, you should copy the entire Administrator folder to `c:\temp`, and then run `c:\temp\administrator\setup.exe`.

ATTENTION Do not share the CD-ROM from a Windows NT 3.51 PC. If you do, the filenames will be corrupted, because Windows NT 3.51 does not support long filenames.

Installing and configuring the License Manager

When to use

Before you can use Symposium WebResponse Server, you must install and configure the License Manager software and license file. You obtain the license file (licence.dat) from your distributor.

Before you begin

Ensure that the Symposium WebResponse Server Dongle is attached to the parallel (printer) port of the computer on which you are installing the License Manager.

Where to install the License Manager

You can install the License Manager software on the same server as the Symposium WebResponse Server Database, or on another computer.

Note: If you have an existing license server for other Nortel Networks products, then you can use this license server for Symposium WebResponse Server as well. Plug the Symposium WebResponse Server Dongle into the license server printer port, and edit the existing license.dat file to include the Symposium WebResponse Server license information.

To install the License Manager

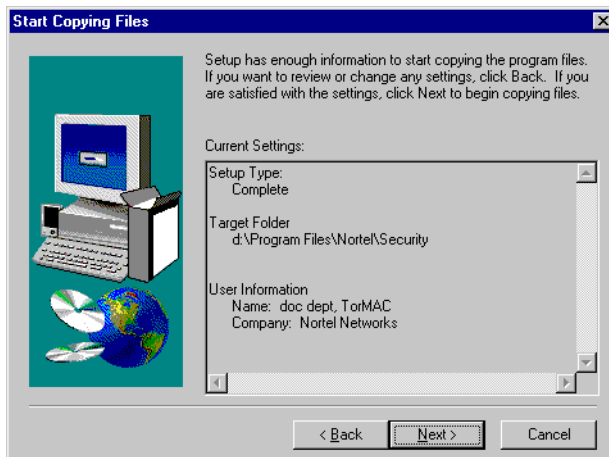
- 1 Insert the Nortel Networks Symposium WebResponse Server CD-ROM into the CD drive.
- 2 Choose Run from the Windows Start menu.
- 3 Click Browse.
- 4 Go to the Nortel Security folder on the CD, and double-click setup.
- 5 Click OK.

Result: The Choose Destination Location dialog box appears.



- 6 To change the destination folder, click Browse, and select the desired folder.
- 7 Click Next.

Result: The Start Copying Files dialog box appears.



- 8 Click Next.

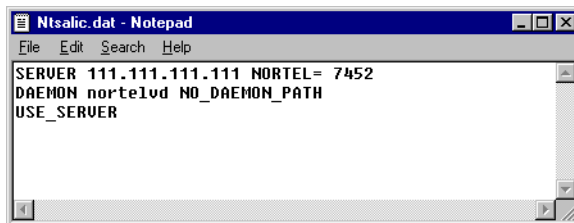
Result: The program installs the License Manager and closes.

- 9 Continue with the following procedure to install the license file.

To install the license file

- 1 Make a backup copy of the License.dat file supplied by your distributor, and store it in a safe place.
- 2 Copy the License.dat file to the c:\Winnt\System32 folder.
- 3 In the same directory, locate and open the file ntsalic.dat using a text editor such as Notepad.

Note: This file directs the Symposium WebResponse Server Administrator to the License Manager (FlexLM) server.

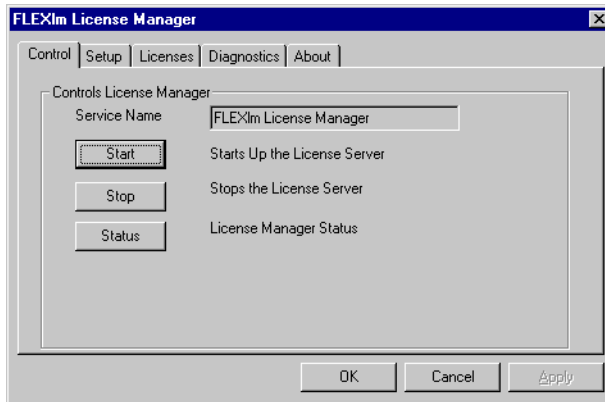


- 4 Replace 111.111.111.111 with the TCP/IP address of the computer on which you installed the License Manager.
- 5 Choose File → Exit, and then click Yes to save this change.

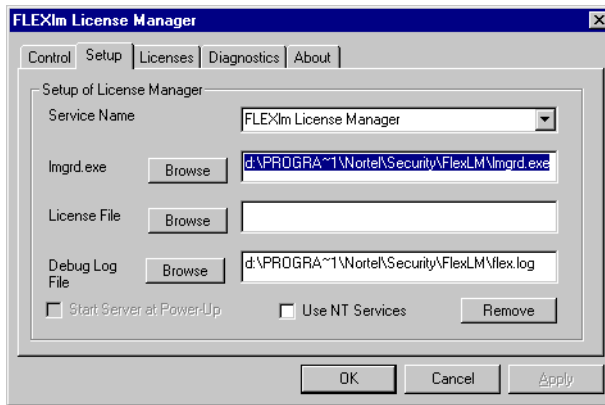
To configure the License Manager

- 1 From the Windows Start menu, choose Programs → Nortel → Security → FlexLM Control Panel.

Result: The FLEXlm License Manager property sheet opens.



- 2 Select the Setup tab to display the Setup fields.



Attention: Do not click Remove. This button removes the License Manager from the NT Services. If the License Manager is removed, then the TAPI server cannot communicate with Symposium WebResponse Server.

- 3 Click Browse to locate the Imgrd.exe file.

The default is the directory in which you installed the Nortel Security software (for example, C:\Program Files\Nortel Security\FlexLM).

- 4 Click Browse to locate the License.dat file.

This file is in the directory to which you copied it in the previous procedure.

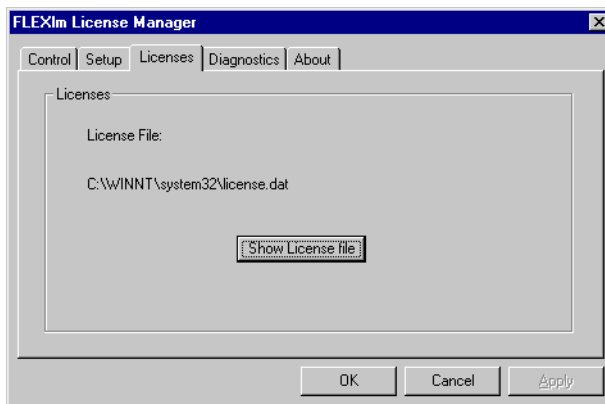
Note: The recommended location is the c:\Winnt\System32 directory.

- 5 Check Use NT Services and Start Server at Power-Up.

The License Manager service must be started before the TAPI server can communicate with Symposium WebResponse Server.

Note: You can also start the License Manager manually by clicking the Start button on the Control property page.

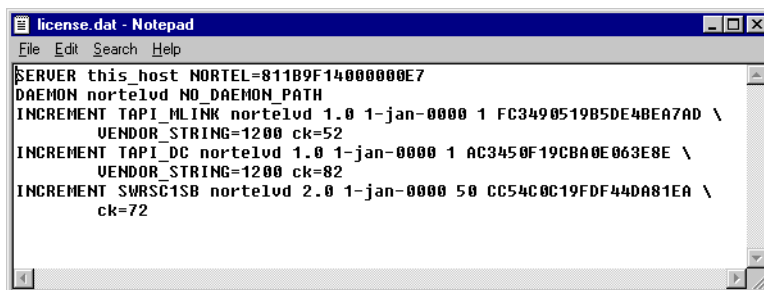
- 6 Click Apply, and then select the Licenses tab.



- 7 Click Show License file.

Result: The license.dat file opens.

Note: The following text shows a sample license file. Your license file may look different, depending on the options that you purchased.



- 8 For Symposium WebResponse Server Release 2.0 support, verify (but do not edit) that the text on the last line of the file is in your license file.

The following table explains the meaning of the text that appears in the last line of the license file shown above:

SWRSC1SB	The Symposium WebResponse Server feature.
2.0	The product version number. This value must be 2.0.
50	The number of users (agents, supervisors, and administrators) that can be logged on at one time.

- 9 On the SERVER line, replace this_host with the host name of your computer.

Note: This name must be exact. To find the host name of your computer, click the Hostid's button on the Diagnostics tab.

Attention: Edit only the this_host field. Editing other fields corrupts the license.dat file and prevents the License Manager from running.

- 10 Choose File → Exit, and then click Yes to save your changes.
- 11 Click Apply, and then click OK to save your changes to the FlexLM configuration.

Installing Sybase Adaptive Server Enterprise

Introduction

To install Symposium WebResponse Server, you first install and configure the Sybase database and the Sybase Adaptive Server Enterprise (Sybase 11.5). The database application is included on your Nortel Networks Symposium WebResponse Server CD-ROM. If you do not have the Sybase 11.5 database installed, you cannot install Symposium WebResponse Server.

You install Sybase Adaptive Server Enterprise (Sybase SQL Server database) using the Sybase installation program included on the Symposium WebResponse Server CD. This installation process supports only a fresh installation of Sybase Adaptive Server Enterprise with Symposium WebResponse Server as the only database.

Note: When you configure the database, the Symposium WebResponse Server setup procedure uses the **sa** account with no password. Do not change or remove the **sa** account.

To install Sybase Adaptive Server Enterprise

Refer to your Sybase documentation for detailed installation instructions. The following steps are specific to Symposium WebResponse Server. Except for the server name, accept the default settings.

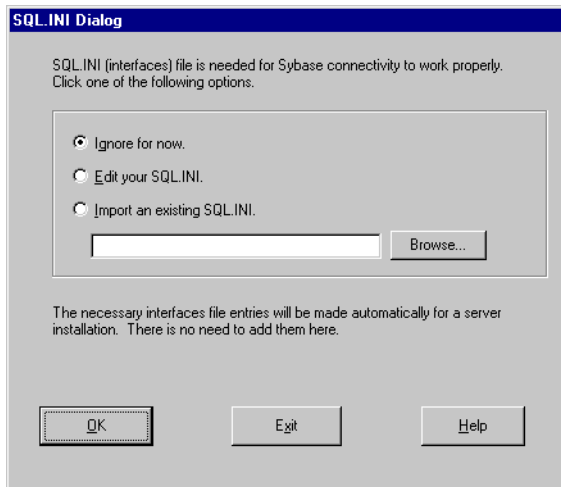
- 1 Log on to Windows NT using the Administrator user ID.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM into the CD drive.
- 3 From the Windows Start menu, choose Run.
- 4 For Open, enter d:\sybase11_5\setup, where d: is the CD drive.
- 5 Click OK.

Result: The Sybase Installation Utility starts. This program guides you through the installation process.

- 6 Follow the instructions on the next few screens, and click Next to accept the defaults.

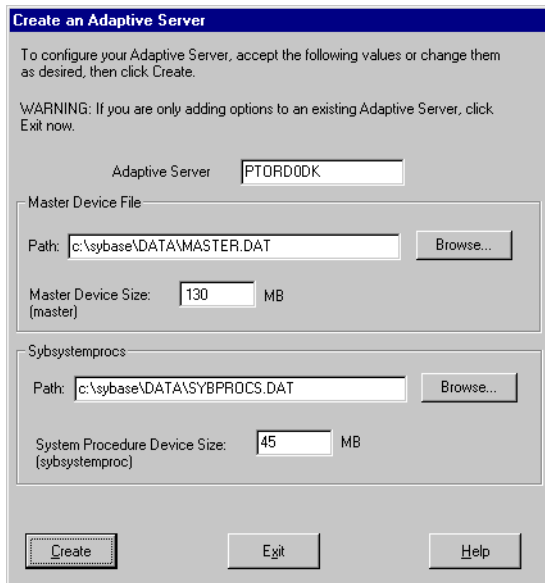
- 7 When the Installation Summary screen appears, click Install.

Result: The install program begins copying files. When the install is complete, the SQL.INI Dialog box appears.



- 8 Click OK.

Result: The Create an Adaptive Server screen appears.



- 9 For Adaptive Server, enter SWRS_SQLSRV.

Attention: Symposium WebResponse Server works only when the server is named SWRS_SQLSRV. Do not use the default name. If you do, Symposium WebResponse Server will *not* work.

- 10 For Master Device Size, enter at least 100 MB, and then click Create.

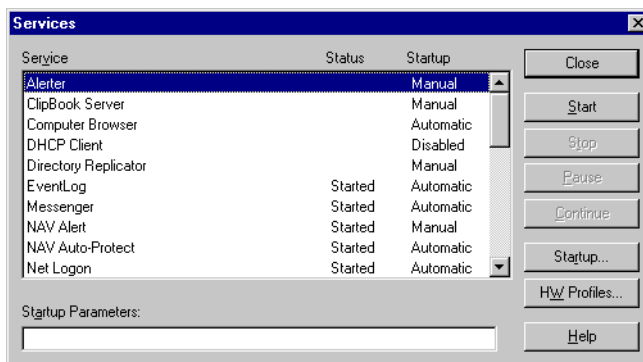
Note: The minimum Master Device Size is 100 Mbytes. You can increase this value if you need a larger database.

Result: The installation of the database begins. On a low-end server, this can take up to 15 minutes.

- 11 When the Installation Complete dialog box appears, select I will reboot my machine later, and then click Finish.
- 12 Continue with the next procedure.

To set the services to start automatically

- 1 From the Windows Start menu, choose Settings → Control Panel → Services.



- 2 Select Sybase SQLServer_SWRS_SQLSRV, and click Startup.
- 3 Select Automatic, and then click OK.
- 4 Select Sybase BCKServer_SWRS_SQLSRV_BS, and click Startup.
- 5 Select Automatic, and then click OK.
- 6 Click Close.

- 7** Restart the database server to ensure that the required services start up before you continue.

Installing the Database component

Introduction

This section describes how to install the database component.

To install the database

- 1 Log on to Windows NT using the Administrator user ID.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM into the CD drive. If the installation program does not start automatically, run Setup.exe from the CD.



- 3 Click Database.
Result: The Welcome window appears.
- 4 Click Next.
Result: The Software License Agreement window appears.
- 5 Click Yes to accept the license agreement.
- 6 Enter your company name and the maximum number of licensed users, and then click Next.

- 7 When prompted to confirm the details you have just entered, click Yes to confirm, or No to make changes.
- 8 Confirm the paths required for the installation, or enter new paths, and then click Next. If any of the paths do not exist, you are asked if you want to create them now. Select Yes to create the paths.
- 9 In the Server IP box, enter the IP address of the server where you are installing the database, and then click Next.

Result: The Start Copying Files screen appears.

- 10 Check the details you entered during setup. If they are correct, click Next.

Result: The setup program starts installing the database.

- 11 Wait while the setup program copies all of the necessary files and modifies and executes some scripts.

Result: The setup program places a shortcut named Shutdown SWRS on the desktop.

- 12 Double-click the shortcut Shutdown SWRS.

Result: Symposium WebResponse Server shuts down.

ATTENTION

You must shut down Symposium WebResponse Server before you continue to the next step. If you do not perform this step, then Sybase increments the transaction numbers by 1 000 000.

- 13 When setup completes, click Finish to restart the server.

Installing the Customer Interface

Introduction

Install the Customer Interface component on the external web server. This component captures customers' web transactions and submits them to Symposium WebResponse Server. The external web server must be available to the Internet if customers are outside the internal intranet.

Information you need

To complete the installation, you need to know the path to the web server root directory. For IIS, this is usually c:\Inetpub\wwwroot. You also need to know the path to the web server scripts directories. If you do not have this information, refer to your web server documentation.

To install the Customer Interface

- 1 Log on to the external web server using the Windows NT Administrator user ID.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM into the CD drive. If the installation program does not start automatically, run Setup.exe from the CD.



- 3 Click Customer Interface.
- 4 If Perl is not installed on your machine, click Yes to install it.

Result: The Welcome screen appears.



- 5 Click Next.
- 6 For the ActivePerl setup, accept the defaults for each window by clicking Yes or Next each time.

Result: The installation of the ActivePerl scripts and Sybperl can take several minutes. When it is complete, the Customer Interface setup continues automatically.

Note: If you do not install the ActivePerl scripts or the Sybperl files at this time, you can install them manually from a batch file on the CD after the Customer Interface setup.

- 7 When the Symposium WebResponse Server Welcome screen appears, click Next.

Result: The Software License Agreement screen appears.

- 8 Click Yes to accept the agreement.
- 9 Confirm the paths to the Perl Library, Browser Scripts, and Browser document root, and then click Next.
- 10 Enter the IP address of the web server on which you are installing this software, and then click Next.

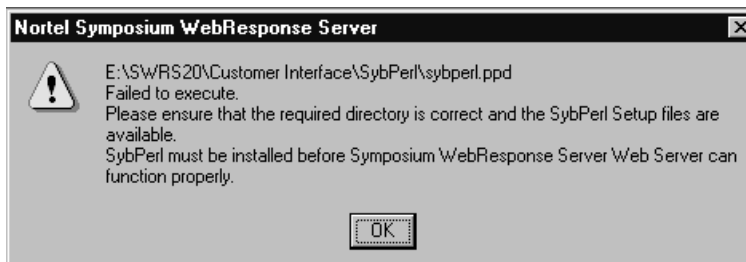
Result: The Start Copying Files screen appears.

- 11 Confirm the settings, and then click Next.

Result: Setup completes.

- 12 When the Setup Complete screen appears, click Finish.

Note: You may see the following warning:



This means that Sybperl was not installed on your computer. If you do, continue the Customer Interface installation, and then follow the procedure below to install Sybperl.

To install Sybperl

- 1 From the Windows Start menu, choose Programs → MS-DOS Prompt.
- 2 In the command line, navigate to the Customer Interface\Sybperl\ directory on the CD.
- 3 Type the following command:
ppm install sybperl.pdd
and press Enter.
Result: Sybperl is installed.
- 4 Type **Exit** to close the command prompt window.

Installing the Agent Interface

Introduction

Agents do their work using a web browser such as Internet Explorer 4.0. The agent user interface is installed on the web server, not on each agent's PC.

You can install the Agent Interface component on the same PC as the Customer Interface, or on a separate web server PC. The Agent Interface does not have to be on the Internet. However, it must be available on the internal intranet to allow agents to connect to this server using their web browser. If the Agent Interface component is installed with the Customer Interface, then the computer on which you install them must meet both sets of hardware and software requirements.

Note: The Agent Interface installation cannot start unless Option Pack 4.0 is installed. For more information about system requirements, see "System requirements" on page 8.

Information you need

To complete the installation, you need to know

- the path to the web server root directory. This is usually c:\inetpub\wwwroot.
- the TCP/IP address of the server where the FlexLM License Manager is installed

Steps to follow

To complete the Agent Interface installation, you must first install Windows Script Version 5.0, then Microsoft Data Access Components (MDAC) 2.1, and then the Agent Interface.

To install Windows Script Version 5.0

- 1 Log on to the Telephony Service PC using the Administrator user ID.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM in the CD drive.
- 3 Click Exit.
- 4 Locate the file ste50en.exe in the folder d:\WebResponse Utility Software folder, where d: is the CD drive.
- 5 Double-click ste50en.exe.
- 6 Click Yes to continue.
- 7 Click Yes to accept the license agreement.

Result: Windows Script Version 5.0 installs.

To install Microsoft Data Access Components (MDAC) 2.1

- 1 Log on to the Telephony Service PC using the Administrator user ID.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM in the CD drive.
- 3 Click Exit.
- 4 Locate the file MDAC_typ.exe in the folder d:\WebResponse Utility Software folder, where d: is the CD drive.
- 5 Double-click MDAC_typ.exe.

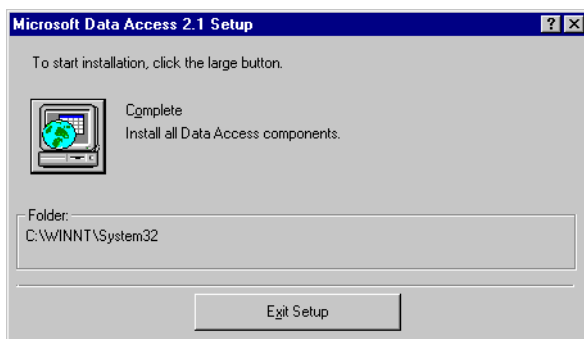
Result: The License agreement screen appears.

- 6 Click Yes to agree to the terms.

Result: The Microsoft Data Access Components 2.1 Setup screen appears.

- 7 Click Continue.

Result: The Microsoft Data Access 2.1 Setup screen appears.



- 8** Click Complete.

Result: The installation begins.

- 9** When the setup is complete, click OK.

- 10** Restart the computer.

To install the Agent Interface

- 1 Log on to the internal web server using the Windows NT Administrator user ID.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM into the CD drive. If the installation program does not start automatically, then run setup.exe from the CD.



- 3 Click Agent Interface.
- 4 If prompted to update the Windows Scripting Library, click No.
- 5 If prompted to install the Microsoft Data Access Components version 2 (MDAC 2.1), click No.

Result: The Welcome screen appears.

- 6 Click Next.

Result: The Software License Agreement screen appears.

- 7 Click Yes to accept the license agreement.

Result: The Information screen appears.

- 8 Click Next.

- 9 Confirm the paths to the web server root directory, usually c:\inetpub\wwwroot, and then click Next.

- 10 Enter the TCP/IP address of the server where the FlexLM License Manager is installed.

Result: The Start Copying Files screen appears.

- 11 Confirm the settings, and then click Next.
 - 12 If you are prompted to overwrite Read Only files, click Yes.
 - 13 When the Setup Complete screen appears, click Finish to restart your computer.
- Note:** If a Sybase error message appears when you shut down, close out of the message. You can ignore this message.

Installing Symposium WebResponse Administrator

Introduction

You can install the Administrator component on a separate PC or on the Database server PC.

The Administrator PC must have Sybase Open Client and Microsoft ODBC Manager installed and configured before you begin installation.

Note: If Sybase Open Client and Microsoft ODBC Manager are not installed and configured on this PC, then install the Sybase Adaptive Server Enterprise and make sure that Adaptive Server Enterprise, Sybase Central, Open Client, and ODBC Driver are checked.

To install Symposium WebResponse Administrator

- 1 Log on to the Administrator PC using the Windows NT Administrator user ID.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM into the CD drive. If the installation program does not start automatically, run setup.exe from the CD.



- 3 Click Administrator.

Result: The Welcome screen appears.

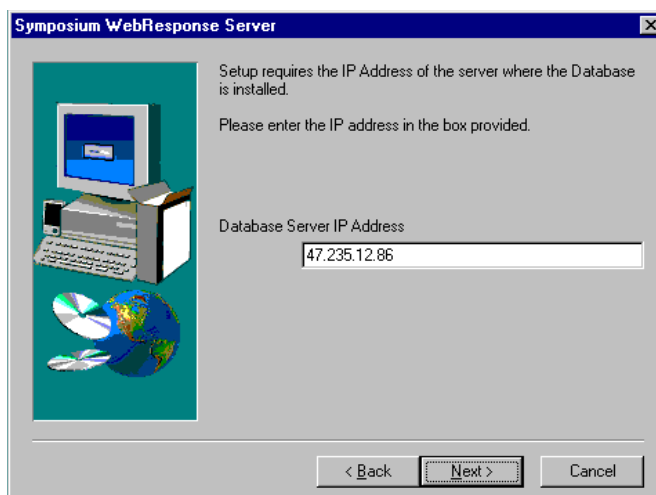
- 4 Click Next.

Result: The Software License Agreement screen appears.

- 5 Click Yes to accept the license agreement.

Result: The Information screen appears.

- 6 Read the special requirements, and then click Next.



- 7 Enter the IP address where the Symposium WebResponse Server database is installed.

Note: If you are installing the Administrator component on the database server, then you do not see this screen.



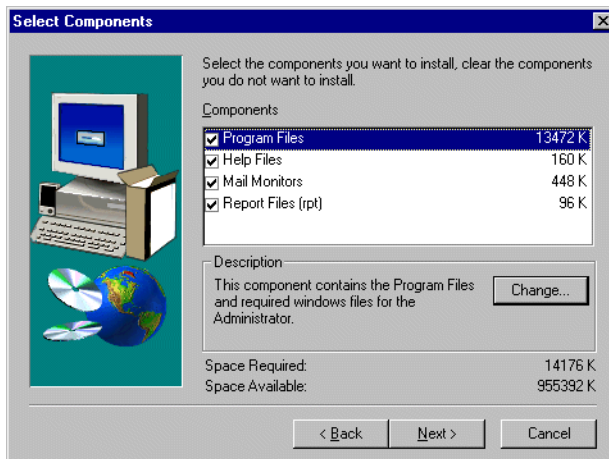
- 8 Enter the IP address of the server where the Agent Interface is installed, and then click Next.

Result: The Choose Destination Location screen appears.



- 9 Edit or accept the destination folder for the Administrator program, and then click Next.

Result: The Select Components screen appears.



- 10** Select the components that you want to install, and then click Next.

Note: You can only install one set of Mail Monitors with Symposium WebResponse Server.

Result: The Start Copying Files screen appears.

- 11** Review the settings. If they are correct, then click Next.

Result: The setup program shows a number of progress messages as it executes database scripts and configures the database.

- 12** When setup is complete, click Finish.

Installing the Telephony Service

Introduction

The Telephony Service component presents new transactions to the agents. You can install it on a separate PC or on the same PC as the Customer Interface or the Agent Interface, or both. If you install the Telephony Service with the Customer Interface or the Agent Interface, then the computer on which you install it must meet all hardware and software requirements.

ATTENTION

The Telephony Service component must *not* be installed on the same PC as the TAPI server. However, the Telephony Service and TAPI server must have the same domain name, or they must have a Trust relationship. For more information, refer to your Windows NT documentation.

Notes:

1. After you install the Telephony Service, you must configure the Data Miner. For more information, see “Configuring the Data Miner” on page 51.
2. The computer on which the Telephony Service is installed must be TAPI-enabled. You must run TCMSETUP on this computer. For more information, refer to the TAPI documentation.

To install the Telephony Service

- 1 Log on to the Telephony Service PC using the Administrator User ID.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM into the CD drive. If the installation program does not start automatically, then run setup.exe from the CD.



- 3 Click Telephony Service.
- 4 When prompted to install the Microsoft Data Access Components (MDAC), choose one of the following options:
 - a. If you are not installing the Telephony Service on the same computer as the Symposium WebResponse Server, click Yes and follow the instructions on the screen to install MDAC 2.1.
 - b. If you are installing the Telephony Service on the Symposium WebResponse Server computer, then MDAC is already loaded. Click No.

Note: You must install MDAC 2.1 on this PC for the Telephony Service to work.

Result: The Welcome screen appears.

- 5 Click Next.

Result: The Software License Agreement screen appears.
- 6 Click Yes to accept the license agreement.

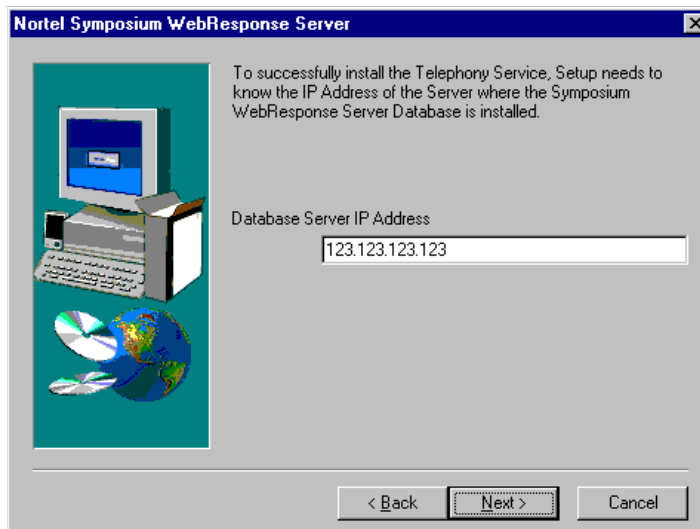
Result: The Information screen appears.



- 7 Read the special requirements, and then click Next.

Result: The Choose Destination Location screen appears.

- 8 Confirm the destination folder, and then click Next.



- 9 Enter or confirm the IP address of the Symposium WebResponse Server database server (for example, 47.235.12.86), and then click Next.

Note: If you are installing the Telephony Service on the same server as the Database, you do not see this screen.

Result: The Start Copying Files screen appears.

- 10 Click Next.
- 11 When Setup Complete screen appears, click Finish to restart your computer.

Configuring the Data Miner

When to use

Follow the instructions in this section after you install the Telephony Service.

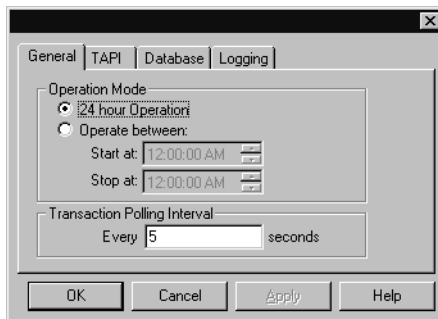
About the Data Miner

The Data Miner is installed when you install the Telephony Service. The Data Miner starts automatically when you restart the server computer after the Telephony Service installation. The Data Miner appears as an icon on the System Tray. The first time you access the Data Miner, you must configure it to function correctly. Afterwards, you can access the Data Miner from the icon in the system tray, or from the Task Manager or Control Panel.

The Data Miner scans the database for any new unprocessed transactions. Once the Data Miner finds a new transaction, it creates a TAPI call to the switch. The TAPI call, containing both the original web request and the DTH-added data, is then blended into the call center's existing ACD call traffic. The call can then be presented to the appropriate agent's phoneset or PC.

To configure the Data Miner

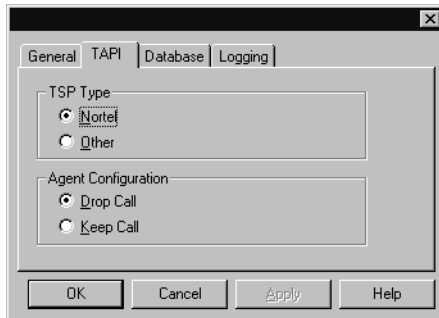
- 1 Double-click the Data Miner icon in the System Tray.



- 2 Enter the hours that you want the Data Miner to be active.

If your call center runs 24 hours a day, select 24 hour Operation. Otherwise, enter the times to start and stop the Data Miner.

- 3 Click apply, and then select the TAPI tab.



- 4 Select the type of TAPI Service Provider that your call center uses, Nortel or Other.
- 5 For Agent Configuration, indicate how the Data Miner should handle calls when the agent accepts an incoming transaction.

IF**THEN**

you want agents to be available to take other calls while they handle the current transaction

choose Drop Call.

you do not want the agent to receive new calls until he or she releases the current transaction

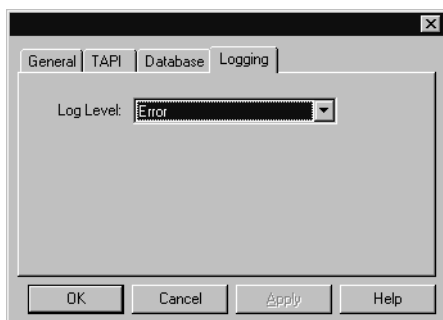
choose Keep Call.

- 6 Click apply, and then select the Database tab.



- 7 The Data Source Name, User ID, and Password fields are automatically configured during the Telephony Service Installation. Do not change this configuration.

- 8 Select the Logging tab.



- 9 Select the type of information that you want the Data Miner to write to the log. Choose Error, Information, or Warning from the drop-down list.
- 10 Click OK.

Result: The Data Miner starts automatically after one minute, unless you start it immediately.

Starting and stopping the Data Miner

To start the Data Miner, right-click the icon in the System Tray and choose Start.

To stop the Data Miner, right-click the icon in the System Tray and choose Stop.

Configuring Internet Information Servers for the Customer Interface

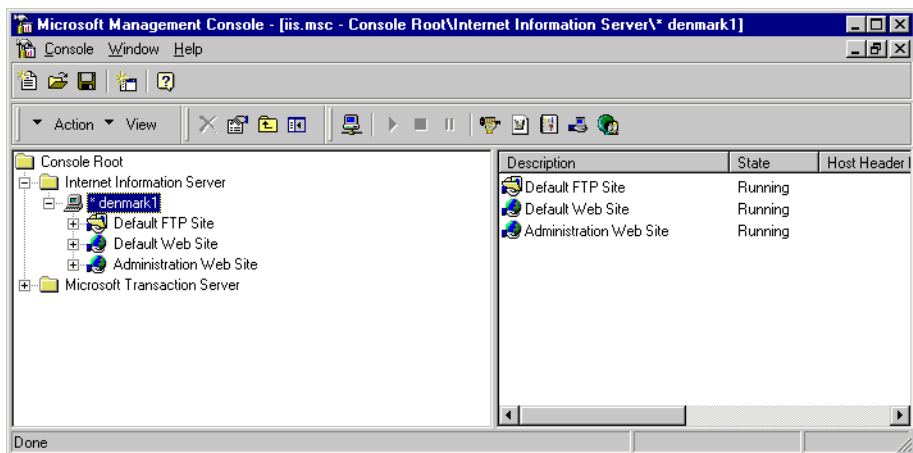
Introduction

You must configure Microsoft Internet Information Server for the Agent Interface. For the Customer Interface, you can use other web servers. The following instructions are for Internet Information Server.

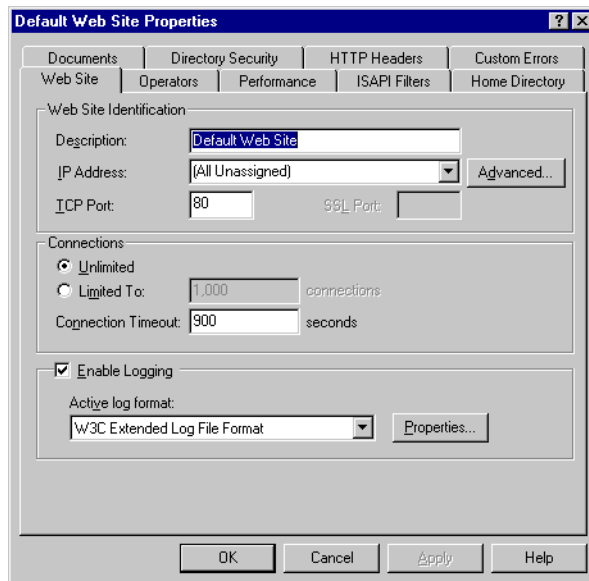
Follow the procedures in this section to configure Internet Information Server for the Customer Interface. For other web servers, refer to the specific documentation.

To configure the Perl scripting engine

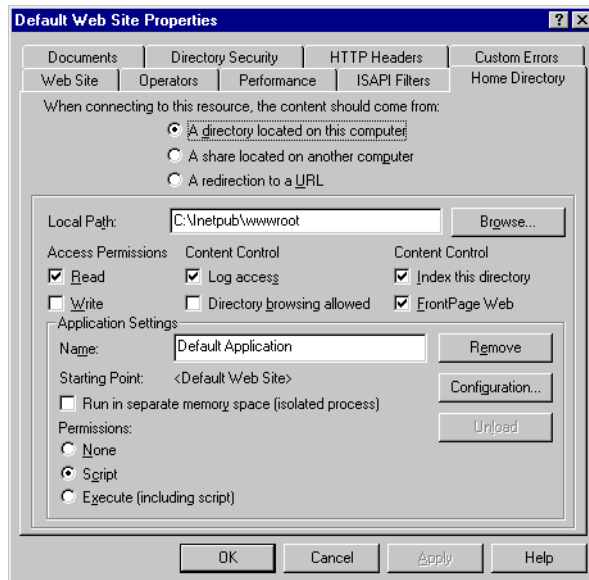
- 1 Log on to the PC running Internet Information Server with Windows NT Administrator privileges.
- 2 From the Windows Start menu, choose Programs → Windows NT 4.0 Option Pack → Microsoft Internet Information Server → Internet Service Manager.
- 3 Expand the server name.



- 4 Right-click on Default Web Site, and choose Properties.

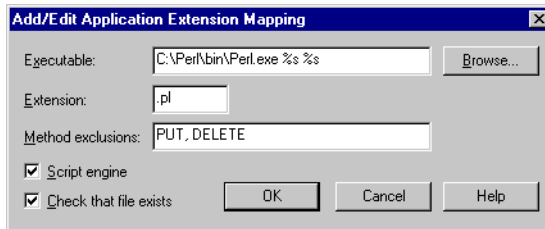


- 5 Select the Home Directory tab.



- 6 Click Configuration.

- 7 Select the App Mappings tab.
- 8 In the Extension column, click the .pl row, and then click Edit.



- 9 Ensure that Script engine is checked, and then click OK.
- 10 Click OK twice to return to the main Internet Service Manager interface.

To configure the Symposium WebResponse Server webs as applications

- 1 Log on to the PC running Internet Information Server with Windows NT Administrator privileges.
- 2 From the Windows Start menu, choose Programs → Windows NT 4.0 Option Pack → Microsoft Internet Information Server → Internet Service Manager.
- 3 Expand the Default Web Site node, and then the Scripts node.
- 4 Right-click on SWRS-CGI, and choose Properties.
- 5 On the Directory tab, ensure that the Permissions are set to Execute.
- 6 In the Application Settings group box, click Create.

Result: The Create button changes to Remove.

- 7 Click OK.
- 8 Click Yes to save your settings, and then exit the window.
- 9 You can view the sample sites by pointing your web browser to <http://<hostname>/SWRS-HTML/index.html>, where <hostname> is the name or IP address of your web server.

Configuring IIS for the Administrator and Agent Interface components

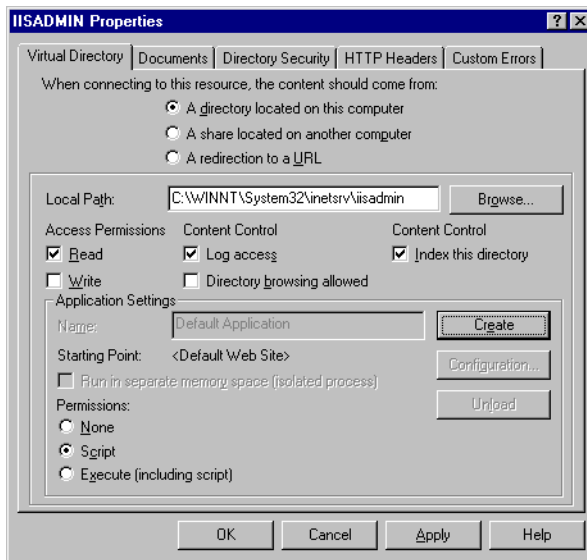
When to use

Follow the procedures in this section to configure Internet Information Server for the Administration and Agent Interface components. Internet Information Server is the required web server for this installation.

To configure the Symposium WebResponse Server webs as applications

- 1 Log on to the PC running Internet Information Server with Windows NT Administrator privileges.
- 2 From the Windows Start menu, choose Programs → Windows NT 4.0 Option Pack → Microsoft Internet Information Server → Internet Service Manager.
- 3 Expand the Default Web Site node.

- 4 Right-click on SWRSAdm node and choose Properties.



- 5 Click Create.
Result: The Create button changes to Remove.
- 6 Click OK to exit the window.
- 7 Right-click on SWRSAgT node and choose Properties.
- 8 On the Directory tab, click Create.
Result: The Create button changes to Remove.
- 9 Click OK to exit the window.
- 10 Click Yes to save your settings, and then exit the window.

Chapter 3

Installing and configuring agent PCs

In this chapter

Mapping network drives to agent PCs	60
Installing the Telephony Client on agent PCs	61
Configuring agent PCs for TAPI Service Provider	64

Mapping network drives to agent PCs

Introduction

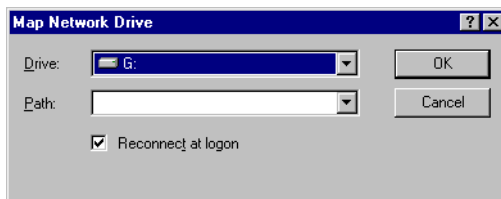
Inbound and outbound attachments to e-mail messages are stored in shared directories. To give agents access to these attached files, you need to map the shared network directories that you create in “Creating and sharing e-mail attachment directories” on page 106, as virtual drives on the agents’ PC.

When agents retrieve attached files from the Inbound directory, the files are prefixed with a transaction number.

When agents attach files, they must be sure that the files are in the directory that you set up for outbound files; otherwise, the messages are not sent and reappear in the queue with an error message.

To map a network drive for file attachments

- 1 Log on to the agent PC.
- 2 Open Windows Explorer.
- 3 Choose Tools → Map Network Drive.



- 4 Enter the path to the computer and the name of the shared directory. For example, type **\\denmark\Files**, where **denmark** is the name of the server computer, and **Files** is the name of the shared directory.
- 5 Ensure that **Reconnect at logon** is checked, and then click **OK**.
- 6 If you use separate directories for inbound and outbound attachments, then repeat steps 3 to 5 for the next drive. For more information about inbound and outbound directories, see “Creating and sharing e-mail attachment directories” on page 106.

Installing the Telephony Client on agent PCs

Introduction

Install the Telephony Client on each agent PC. It is an interface between the TAPI Client software and the Agent Interface and is required if the Agent Interface will be supporting telephony (specifically the pop-up dialer).

The Telephony Client can be installed on either a Windows 95 platform or on a Windows NT Workstation 4.0 with Service Pack 4 installed.

Installing TAPI 2.1

For Windows 95 platforms, you must install the Microsoft TAPI Client 2.1 software to use the telephony functions such as the softphone. You can find the TAPI client software at <ftp://ftp.microsoft.com/developr/TAPI/TAPI2195.zip>.

Do not install TAPI Client 2.1 on Windows NT. The TAPI software is installed by default on Windows NT with Service Pack 4 installed.

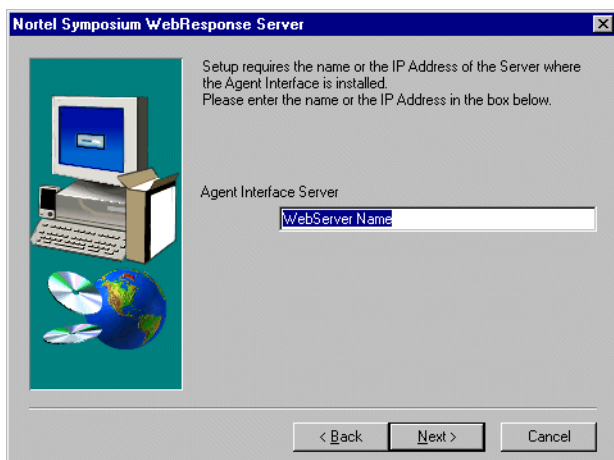
To install the Telephony Client

- 1 Log on to the agent PC.
- 2 Insert the Nortel Networks Symposium WebResponse Server CD-ROM. If the installation program does not start automatically, then run setup.exe from the CD.



- 3 Click Telephony Client.
Result: The Welcome window appears.
- 4 Click Next.
Result: The Software License Agreement window appears.
- 5 Click Yes to accept the agreement.
Result: The Information window appears.
- 6 Note the requirements for TAPI Client 2.1 to be installed on the agents' workstations, and then click Next.
Result: The Choose Destination Location window appears.

- 7 Click Next.



- 8 Enter the IP address or computer name of the PC where the Agent Interface is installed, and then click Next.
Result: The Start Copying Files window appears.
- 9 Confirm the settings, and then click Next.
Result: The installation begins.
- 10 When the Setup Complete window appears, click Finish.

Configuring agent PCs for TAPI Service Provider

Introduction

This section explains how to run the TCM Setup program. Run TCM Setup on each agent PC to configure it for the TAPI Service Provider, if this agent will be using a softphone.

For detailed instructions on configuring agent PCs for telephony, refer to the TAPI Service Provider documentation.

Before you begin

Ensure that agent PCs that run Windows 95 have the TAPI Client 2.1 installed for use with the softphone. (Agent PCs running Windows NT have the TAPI Client software installed by default.)

Note: After the TAPI Service Provider is installed on the server, the installer must set up a telephone line on the switch for each agent who will be using a softphone, and that line must be mapped in the TAPI Service Provider. Refer to the TAPI Service Provider documentation.

To run the TAPI Client setup

- 1 Log on to the agent PC.
- 2 Choose Run from the Windows Start menu.
- 3 For Open, type **TCMSSetup/c SERVERNAME**, where SERVERNAME is the name of the server where the TAPI Service Provider is installed.

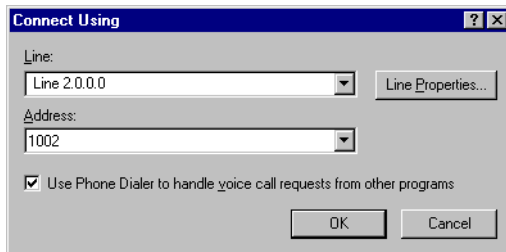
Result: If the TAPI Client setup was successful, you see the following message:



- 4 Check for TAPI Service Provider in the phone dialer accessory on the PC. To do so, choose Programs → Accessories → Phone Dialer.



- 5 Choose Tools → Connect Using.



Result: If phone lines appear in the drop-down list under Lines, then TAPI is configured.

- 6 If no lines appear in the Line drop-down list, check your TAPI configuration.
- 7 Select the line that you use to make calls.

Chapter 4

Managing skillsets and users

In this chapter

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Managing users and customers	78
Adding and deleting users	79
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Overview

How Symposium WebResponse Server is licensed

Your license agreement authorizes the maximum number of logins without regard to the total number of workstations at your site.

For example, if you have 30 workstations at your site and have paid for 20 licenses, any of the 30 agent workstations can access Symposium WebResponse Server as long as no more than 20 agents log on to the server at the same time.

Symposium WebResponse Server refuses additional logins once the maximum number of logins has been reached. Contact your distributor for details on purchasing additional licenses.

Note: If an agent goes offline without formally logging off, then a supervisor or administrator may need to force a logout on the server. This is especially important if you are approaching the maximum number of logins.

Configuring agent access to Symposium WebResponse Server

To handle Symposium WebResponse Server-generated inquiries, agents must have a compatible web browser installed on their workstations. After you install the Symposium WebResponse Server software on the server and web server, point the agents' browsers to the intranet web server's files. By default, the URL is `http://<servername>/swrsagt/login.asp`, where `<servername>` is the web server machine name or IP address.

Before agents can log on to the web server, an administrator or supervisor must add the agents' user IDs and passwords. Use Symposium WebResponse Administrator to add user IDs and passwords.

Sample web sites

Web pages are one source of the Internet transactions that Symposium WebResponse Server handles. People who are browsing the Internet can fill out and submit a form on the web that is then collected by Symposium WebResponse Server.

Symposium WebResponse Server provides two sample web sites that your web master can customize. To view the sites, point your browser to `http://<machinename>/swrs-html/index.html`, where `<machinename>` is the computer name or IP address of the web server used by Symposium WebResponse Server.

Logging on to Symposium WebResponse Server Administrator

Introduction

This section explains how to log on to and off of Symposium WebResponse Administrator.

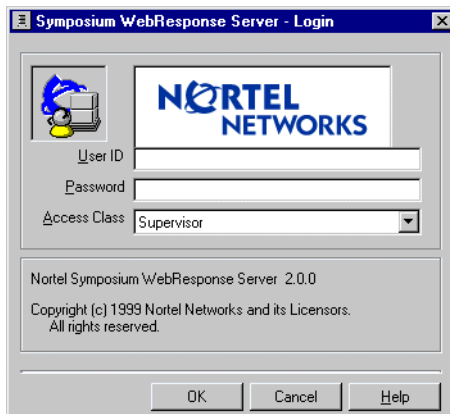
Only administrators or supervisors can log on to Symposium WebResponse Administrator. You cannot delete the default Administrator and Supervisor logins (Sysadmin and Syssuper) that are supplied with Symposium WebResponse Server.

Default user ID

The first time you log on to Symposium WebResponse Administrator, use the default user ID, “sysadmin,” and the password “nortel.” You should create a user ID with administrative privileges for future use.

To log on to Symposium WebResponse Administrator

- 1 From the Windows Start menu, choose Programs → Nortel Networks - Symposium WebResponse Server → Administrator → Administrator.



- 2 Enter your user ID and password.
- 3 From the Access Class list, select the access class that matches your user ID.

If your login is rejected, check that you are using the correct access class and that the database server is online.

To log off of Symposium WebResponse Administrator

To log off of Symposium WebResponse Server, choose File → Exit.

Managing skillsets

Introduction

A skillset is a label applied to a set of skills, capabilities, or knowledge that may be required of an agent to respond to a given request.

Note: You can assign only agents to skillsets. You cannot assign supervisors or administrators to skillsets.

For example, Claire is fluent in French. To make sure that French-speaking messages go to the most capable agent, the supervisor creates a skillset called French. Any requests that are labeled French go to Claire.

Vic and Lee, who work in the same call center, handle difficult technical issues. Therefore, both are assigned to the Technical skillset. Since Lee understands French, he is also assigned to the French skillset as a backup to Claire.

When a customer sends a message that matches the French skillset, Symposium WebResponse Server puts the inquiry into the French queue. When Claire and Lee log on, they see the skillset name and message list.

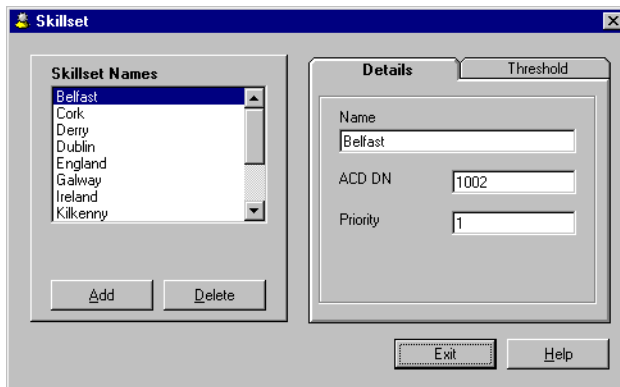
Default skillset

There is no default skillset in Symposium WebResponse Server. However, you can create a skillset to use as the default, and then assign all of the agents in your call center to the skillset. You might want to do this to ensure that your customers always have a skillset to choose on the web form.

To add skillsets

- 1 From the Symposium WebResponse Administration window, click the plus sign (+) next to Symposium WebResponse Server.
- 2 Click the plus sign (+) next to System Administration.

3 Double-click Skillsets.

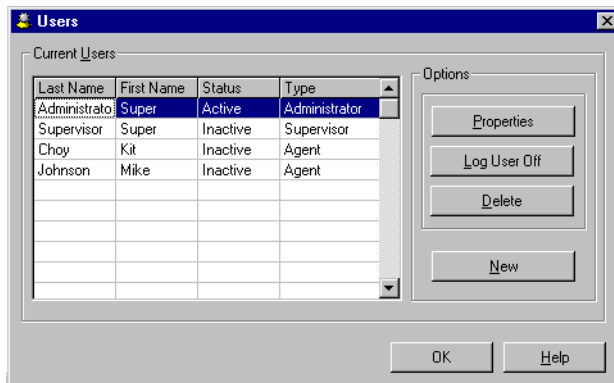


- 4 Click Add.
- 5 On the Details tab, enter the name of the skillset.
- 6 In the ACD DN box, type the number that has been assigned to handle callbacks from this skillset.
- 7 In the Priority box, assign the priority for callbacks from this skillset.
- 8 To add more skillsets, repeat steps 4 to 7.
- 9 When you are finished adding skillsets, click Exit.

To assign agents to skillsets

- 1 From the Symposium WebResponse Administration window, click the plus sign (+) next to Symposium WebResponse Server.
- 2 Click the plus sign (+) next to User/Customer Administration.

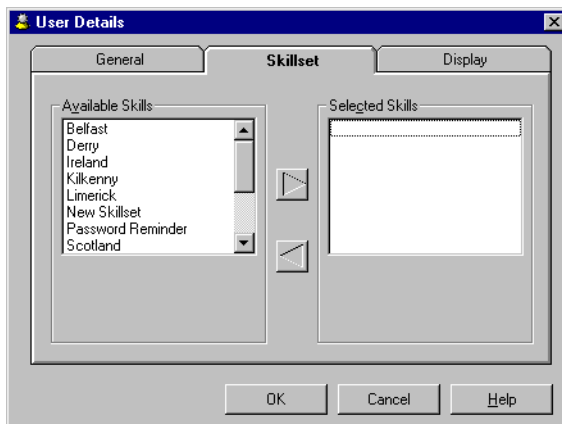
3 Double-click Users.



4 From the Current Users list, select the agent you want to assign to a skillset.

5 Click Properties.

6 Select the Skillset tab.



7 In the Available Skills pane, click the skillset to which you want to assign the agent.

8 Click the right arrow.

9 Click OK.

To change skillset properties

- 1 From the Symposium WebResponse Administration window, click the plus sign (+) next to Symposium WebResponse Server.
- 2 Click the plus sign (+) next to System Administration.
- 3 Double-click Skillsets.
- 4 In the Skillset Names box, select the skillset that you want to change.
- 5 Select the Details tab to change the Web description, the ACD-DN, or the priority.
Note: You cannot change the skillset name.
- 6 Select the Threshold tabs to change the real-time display threshold values.
- 7 When you are finished, click Exit.

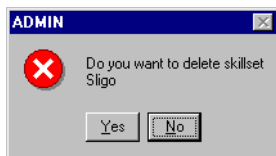
To delete skillsets

ATTENTION

When you delete a skillset, all transactions that are assigned to that skillset are lost, even if you create another skillset with the same name. This is because a skillset is assigned a unique ID that maps to the skillset name.

- 1 From the Symposium WebResponse Administration window, click the plus sign (+) next to Symposium WebResponse Server.
- 2 Click the plus sign (+) next to System Administration.
- 3 Double-click Skillsets.
- 4 Select the skillset that you want to delete.
- 5 Click Delete.

Result: You see the following message:



- 6 Click Yes to confirm that you want to delete the skillset.

Handling unassigned skillsets

When to use

Symposium WebResponse Server automatically checks for unassigned skillsets.

Every skillset must have at least one agent assigned to it at all times. Otherwise, transactions received for the unassigned skillset will be stored in the database but not sent to agents for processing.

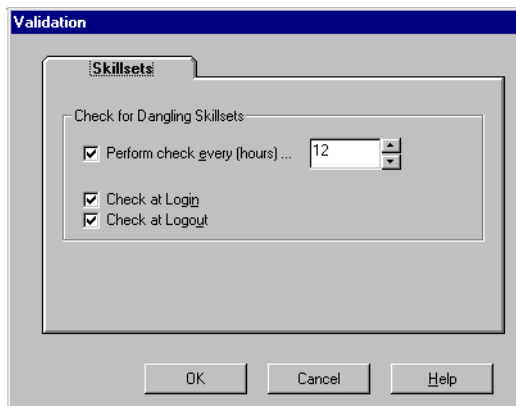
If you receive an error message about an unassigned or dangling skillset, you should assign an agent to the skillset right away—even if the agent is not logged on—to avoid losing track of transactions. The system stores any transactions received for that skillset in the database. The agent who has been assigned to the skillset will see the transactions when she or he logs on.

Symposium WebResponse Server verifies skillsets at intervals that you configure. You can schedule a validation for a specific interval (in hours) for each time that you log on, and for each time that you log off.

To set the skillset validation interval

Use the Validation window to set the occasions when Symposium WebResponse Server automatically checks for unassigned skillsets.

- 1 In Symposium WebResponse Administrator, choose Utilities → Options.
- 2 Ensure that the Perform check every (hours) check box is checked.



- 3 Set the number of hours that you want to pass between skillset validations.

Managing users and customers

Understanding user access classes

Access classes define and control the permissions of users who are logged on to Symposium WebResponse Server. Each user must belong to one of three fixed classes: Administrator, Supervisor, or Agent.

The following list shows the permissions that are assigned to members of each of the three access classes:

Agent

- Log on to the Agent Interface using a web browser.
- Respond to customer inquiries.
- View real-time displays.

Supervisor

- Log on to Symposium WebResponse Administrator.
- Add and delete agents.
- Add and delete skillsets.
- Move agents between skillsets.
- Log agents and supervisors off.
- View and print real-time displays.
- Configure thresholds and threshold displays for agents.

Administrator

Administrators have all of the same permissions as supervisors, and can also do the following:

- Configure the system.
- Add, delete, or log off administrators.
- Remove historic information from the database.

Adding and deleting users

When to use

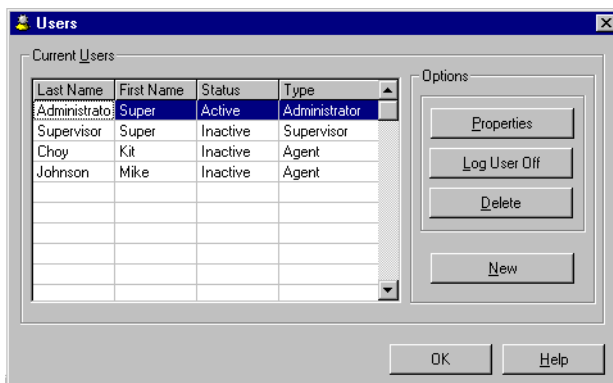
Follow the procedures in this section to add and delete administrators, supervisors, and agents.

Note: You cannot delete the default Administrator and Supervisor logins (Sysadmin and Syssuper) that are supplied with Symposium WebResponse Server.

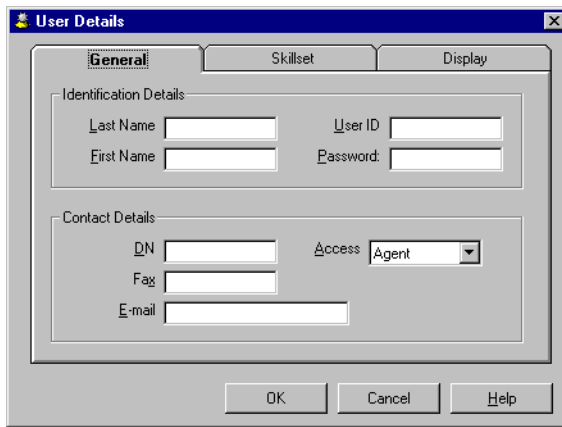
You can create agents without assigning them to skillsets. However, agents will not see any transactions unless they are assigned to a skillset.

To add administrators or supervisors

- 1 Log on to Symposium WebResponse Administrator as an administrator
Only administrators can add administrators and supervisors.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Users.



5 Click New.

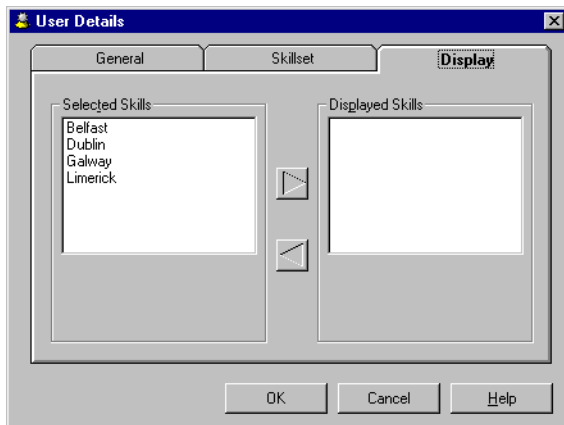
The image shows a 'User Details' dialog box with a blue title bar and a close button. It has three tabs: 'General' (selected), 'Skillset', and 'Display'. The 'General' tab contains two sections: 'Identification Details' and 'Contact Details'. 'Identification Details' has four text boxes: 'Last Name', 'First Name', 'User ID', and 'Password'. 'Contact Details' has three text boxes: 'DN', 'Fax', and 'E-mail', and a dropdown menu for 'Access' currently set to 'Agent'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

- 6 Type the new user's identification and contact details.
- 7 Select the user's access class, either Administrator or Supervisor.
- 8 Click OK.

To add agents

- 1 Log on to Symposium WebResponse Administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Users.
- 5 Click New.
- 6 Enter the new agent's identification and contact details.
- 7 Select the Skillset tab.
- 8 Select the skillset to which the agent belongs, and click the arrow to move the skillset to the Selected Skills box.

9 Select the Display tab.



10 Select the skillset(s) that you want to appear on the agent's real-time display, and then click the arrow to move the skillset to the Displayed Skills box.

11 Click OK.

To change user properties

- 1** Log on to Symposium WebResponse Administrator with administrator's permissions.
- 2** Click the plus sign (+) next to Symposium WebResponse Server.
- 3** Click the plus sign (+) next to User/Customer Administration.
- 4** Double-click Users.
- 5** Select the user whose properties you want to change.
- 6** Change the General, Skillset, and Display properties as required.
- 7** When you are finished, click OK.

To delete a user

- 1 Log on to Symposium WebResponse Administrator. If you want to delete an administrator or supervisor user ID, you must log on with administrator permissions.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Users.
- 5 Select the user that you want to delete.

Note: You cannot delete the default Administrator and Supervisor logins (Sysadmin and Syssuper) supplied with Symposium WebResponse Server or change the supplied default passwords.

- 6 Click Delete.
- 7 Confirm that you want to delete the selected user.

To view agent status

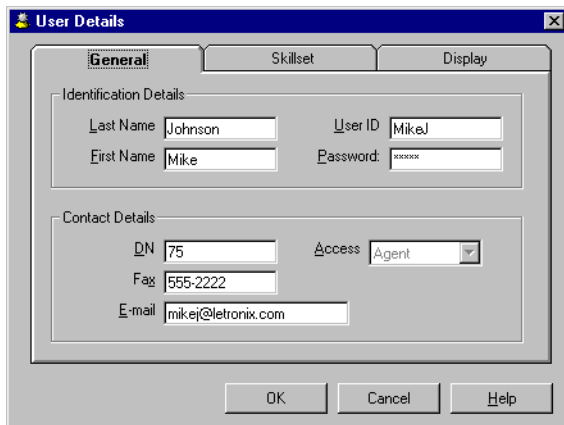
- 1 Log on to Symposium WebResponse Administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Users.

Result: The Status column displays whether agents are currently active or inactive.

To change user passwords

- 1 Log on to Symposium WebResponse Administrator. If you want to change an administrator's or supervisor's password, you must log on with administrator permissions.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Users.
- 5 Select the user whose password you want to change.

6 Click Properties.

A dialog box titled "User Details" with three tabs: "General", "Skillset", and "Display". The "General" tab is selected. It contains two sections: "Identification Details" and "Contact Details". In "Identification Details", there are fields for "Last Name" (Johnson), "First Name" (Mike), "User ID" (MikeJ), and "Password" (masked with asterisks). In "Contact Details", there are fields for "DN" (75), "Fax" (555-2222), "E-mail" (mikej@letronix.com), and "Access" (Agent). At the bottom are "OK", "Cancel", and "Help" buttons.

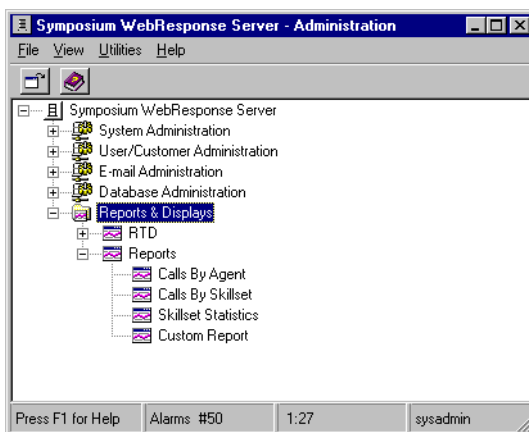
7 Enter the new password in the Password box.

For security, asterisks replace the password characters as you type.

8 Click OK.

To view your user ID

To view the user ID with which you are currently logged on, choose View → Status Bar from the Symposium WebResponse Administration window.

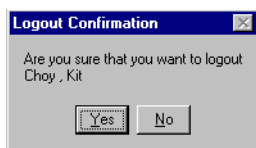


Your current user ID is shown at the right of the status bar.

Note: If the status bar is already displayed, a check mark appears beside the Statusbar menu item.

To log users off of the system

- 1 Log on to Symposium WebResponse Administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Users.
- 5 Select the user you want to log off.
- 6 Click Log User Off.



- 7 Confirm that you want to log the user off.

Working with customers

When to use

This section explains how to view a list of customers or search for a particular customer, how to edit customer information, and how to bar and unbar customers.

Barred customers

Barred customers are those who have been abusive or a nuisance. For instance, if your call center receives many inappropriate messages from a web form or spam (unwanted commercial e-mail), agents can add the source's Internet address to the Barred Customers list.

Symposium WebResponse Server does not store transaction requests from barred customers. Messages from barred customers do not appear on agents' screens.

Symposium WebResponse Server determines whether to reject messages from barred customers based on the Customer ID, Customer Name, E-mail address, Telephone number, and Fax number columns.

To view the list of customers

In the Customer Listing window, you can view the list of customers and edit the customer's details.

- 1 Log on to Symposium WebResponse Administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.

- 4 Double-click Customer Listing.



- 5 To display a list of customers, click the Display List button.
- 6 To sort the list of customers, click on a column heading.
- 7 To search for a customer, click the Search button and enter the text to find.

To change customer details

- 1 Log on to Symposium WebResponse Administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Customer Listing.
- 5 Click the Edit button  next to the name of the customer that you want to edit.
- 6 Update the customer details as necessary, and then click Submit.

To view the list of barred customers

- 1 Log on to Symposium WebResponse Administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Barred Customer Listing.



- 5 Click the Display List button or the Search button to locate a barred customer.

To bar customers

- 1 Log on to Symposium WebResponse Administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Barred Customer Listing.
- 5 Click the Display List button or the Search button to locate the customer.
- 6 Click the bar icon  on the row that you want to edit.
- 7 Check the criteria to use for blocking messages from this customer. For example, you can scan for the customer name, a telephone number, or the customer ID.
- 8 Configure the date at which the customer's transactions will no longer be blocked.

- 9 Click Submit.

To remove customers from the barred list

- 1 Log on to Symposium WebResponse Administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to User/Customer Administration.
- 4 Double-click Barred Customer Listing.
- 5 Click the Display List button or the Search button to locate the customer.
- 6 Click the bar icon  on the row that you want to edit.
- 7 Click Un-bar.

Chapter 5

Configuring e-mail for Symposium WebResponse Server

In this chapter

Overview	90
Establishing e-mail accounts	92
Configuring the e-mail client	94
Mapping e-mail profiles to skillsets	101
Changing the default outbox	104
Creating and sharing e-mail attachment directories	106
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Overview

Introduction

Symposium WebResponse Server fully integrates Internet e-mail messages into your call center workflow. The e-mail functionality requires an e-mail server (such as Microsoft Exchange Server) on your network. On the computer that hosts Symposium WebResponse Server, you need to run an e-mail client such as Microsoft Exchange Client or Outlook.

How e-mail works with Symposium WebResponse Server

The following example shows how e-mail works with Symposium WebResponse Server:

- A customer sends an e-mail message to the call center.
The e-mail is routed to the e-mail accounts and mail profiles that you create, such as the alias `sales@letronix.com` and the mailbox profile, `sales_profile`.
- The Inbound Mail Monitor, part of Symposium WebResponse Server, scans the Inboxes and profiles at the interval that you set.
- When the Inbound Mail Monitor detects the message in an Inbox, it assigns the message a transaction number and queues the message to the skillset that you have designated (that is, mapped) to the e-mail account.
From this point, the e-mail is treated in the same way as a transaction originating from a web form.
- When agents send e-mail messages as replies, the messages are stored in the Symposium WebResponse Server database and placed in the default outbox of the profile that you have configured for outbound messages.
For example, the outbound mailbox may be `info@letronix.com` and the profile may be `info_profile`.

Note: Agent workstations do not use a personal e-mail client. All mail is sent from one common account located on the server.

- If an incoming e-mail message includes an attached file, the attachment is stored on the computer that runs Symposium WebResponse Server. Inbound attachments use the transaction ID as a prefix.
Attachments for outbound messages are stored in a shared directory on the server to be included with the outbound e-mail message. You can configure the location of the attachments in the administration module, under E-Mail Configuration and on the Settings tab.

Establishing e-mail accounts

Introduction

Symposium WebResponse Server fully integrates Internet e-mail messages into your call center agents' work flow. To support this feature, establish e-mail accounts to receive and send e-mail using Symposium WebResponse Server. You also need to acquire as many e-mail accounts as you wish to allocate to Symposium WebResponse Server.

For example, you may want to accept messages to support@letronix.com, sales@letronix.com, and service@letronix.com. You may want outgoing messages to originate from info@letronix.com.

To establish e-mail accounts

- 1 Determine the number of e-mail accounts you need.

The number of accounts you need depends on the number of distinct products or services you offer and the number of skillsets in your call center.

Tip: You can create one generic e-mail account for outbound mail.

- 2 Create a primary Windows NT user account on which to base all of the accounts you need. For example, in the Windows NT User Manager for Domains utility, add a user named SWRS Mail with the user ID "swrs" and password "swrs."
- 3 Add this user to the NT Domain Users group.

ATTENTION

All of the mailboxes for Symposium WebResponse Server must belong to the same primary Windows NT account. The primary account's user rights should be as a Domain User and no higher. Symposium WebResponse Server has higher-level access rights, which it uses to open the Domain User's mailboxes.

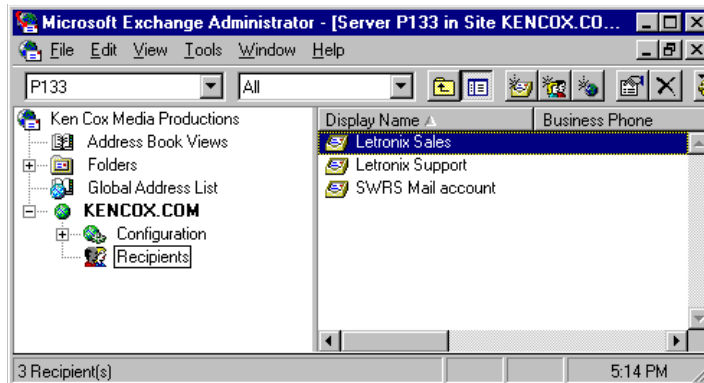
- 4 In Microsoft Exchange, create the mailboxes, aliases, and Internet addresses that you need to integrate with Symposium WebResponse Server.

- 5 Assign all of the accounts to the Primary Windows NT account that you created in step 2. For example, you could set up the mailboxes as follows:

Letronix Sales, sales, sales@letronix.com

Letronix Support, support, support@letronix.com

Letronix Info, info, info@letronix.com



- 6 Ensure that you have a record of the mailboxes, aliases, Primary Account, password, and computer name where the mailboxes reside.

Configuring the e-mail client

Introduction

To use Symposium WebResponse Server's e-mail functionality, you need a MAPI-compliant e-mail server, such as Microsoft Exchange Server, on your network. Install the e-mail client on the same computer as the Administrator component.

Symposium WebResponse Server works with Microsoft Exchange Server and Lotus Notes. This section describes how to configure an Exchange client using Outlook 98. The screens and dialog boxes shown in this section may be different from what you see, depending on the client and version that you use.

Agent workstations do not use an e-mail client. All e-mail flows through the database and mailbox on the Symposium WebResponse Server machine.

Follow the instructions in this section to set up messaging profiles that route customer e-mail requests to skillsets. A Microsoft Exchange profile is a record of the location of a recipient's Inbox, Outbox, and other information services. When you create a profile, the profile name and services are noted in the registry. There is no file or file name for the profile. For more information on profiles, see Microsoft Knowledge Base article ID Q129211.

Before you begin

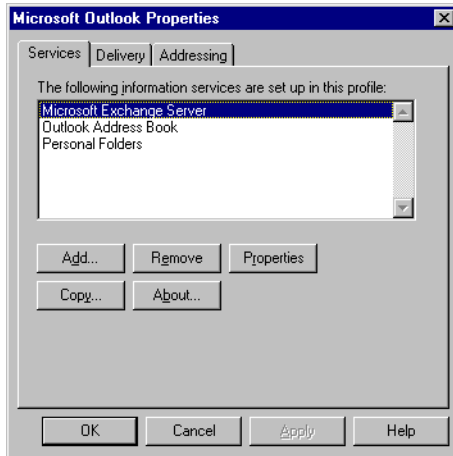
The e-mail client must already be installed on the computer that runs the Symposium WebResponse Server Administration component. For detailed installation instructions, refer to the documentation that comes with the e-mail software application.

Information you need

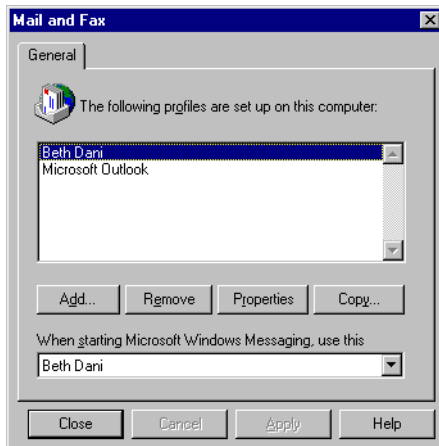
To configure mailbox profiles, you need to know the computer name of the Microsoft Exchange Server. Get this information from the Microsoft Exchange Server administrator.

To configure mailbox profiles for Symposium WebResponse Server

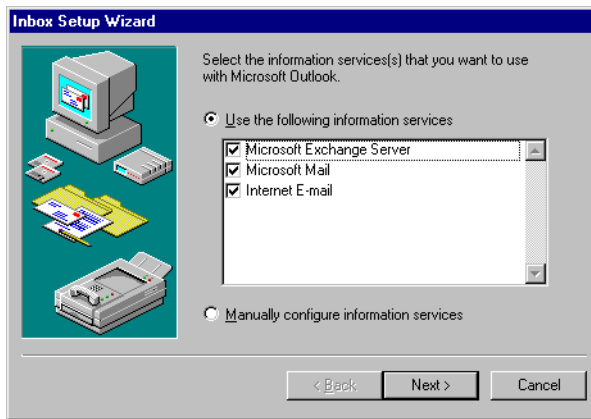
- 1 From the Windows Start menu, choose Settings → Control Panel → Mail (or Mail and Fax).



- 2 On the Services tab, confirm that you have an entry for Microsoft Exchange Server. If Microsoft Exchange Server does not appear, check your Exchange client installation before you continue.
- 3 Click Show Profiles to display the existing profiles, if any.



4 Click Add.



5 Select Use the following information services.

6 Ensure that the check box next to Microsoft Exchange Server is checked and that all other check boxes are unchecked, and then click Next.



- 7 In the Profile Name box, enter the name of an e-mail profile to use with WebResponse Server. For example, for sales@letronix.com, you could create a profile called sales_profile, and then click Next.

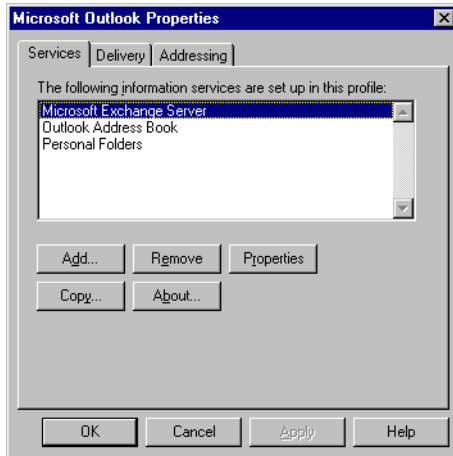
Note: Profile names are case-sensitive.



- 8 In the Microsoft Exchange server box, enter the computer name (not the domain name) of the Microsoft Exchange Server. The Exchange Server administrator provides the computer name.
- 9 In the Mailbox box, enter the name of the e-mail account as provided by your Exchange Server administrator. This may be a descriptive name such as Letronix Sales, or an e-mail alias such as sales.
- 10 Click Next to confirm that you do not travel with this computer.
- 11 Click Next to accept the default path to the Personal Address Book.
- 12 If prompted, click Next to bypass adding Outlook to the startup group.
- 13 Click Finish to return to the General tab of the Mail property page.
- 14 If you have more profiles to add, then repeat steps 1 to 13.
- 15 Write down the exact names of all of the profiles that you created. You need to know them when you map the e-mail profiles to skillset in your call center.
- 16 Click Close.

To verify the setup of the mailbox profiles for Symposium WebResponse Server

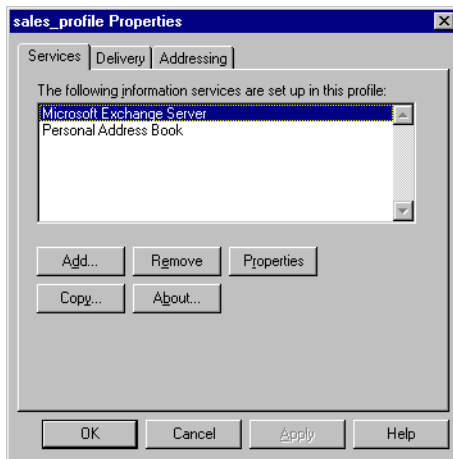
- 1 From the Windows Start menu, choose Settings → Control Panel → Mail (or Mail and Fax).



- 2 On the Services tab, click Show Profiles to display the existing profiles.



- 3 Select a profile, and then click Properties.



- 4 Select Microsoft Exchange Server, and then click Properties.



- 5 On the General tab, click Check Name.
- 6 If prompted, enter your User Name, Exchange Server, Domain Name, and Password.
- 7 Check whether the Microsoft Exchange Server name and Mailbox name are underlined. The underline indicates that the mailbox account is valid.
- 8 Click OK twice to return to the list of profiles.

- 9** Repeat steps 3 to 8 for each profile.
- 10** Click Close.

Mapping e-mail profiles to skillsets

Introduction

You must configure Symposium Web Response Server to transfer e-mail messages from the appropriate Inboxes to the Symposium WebResponse Server database. You map the Exchange profiles to existing skillsets.

Information you need

To complete the procedure in this section, you need the list of e-mail profiles that you created in “To configure mailbox profiles for Symposium WebResponse Server” on page 95.

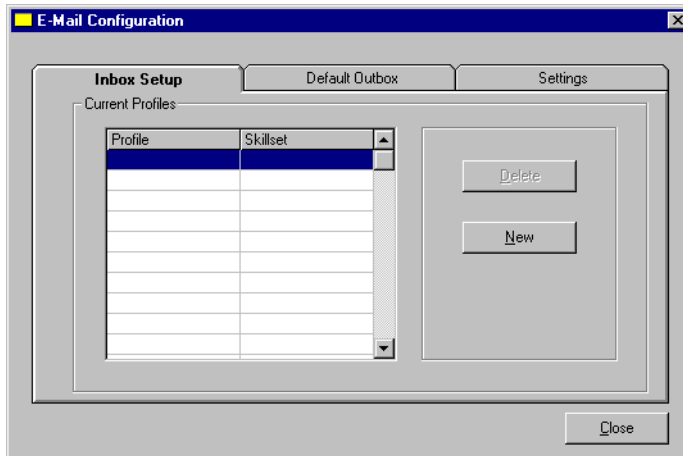
Before you begin

Add the skillsets to which e-mail messages will be assigned. For information about adding skillsets, see “To add skillsets” on page 72.

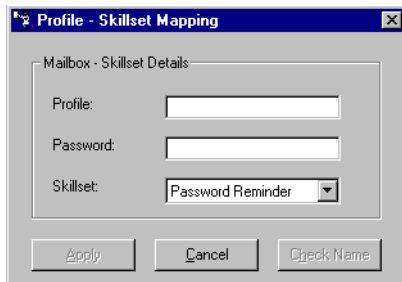
To map e-mail profiles to skillsets

- 1 From the Windows Start menu, choose Programs → Nortel Networks - Symposium WebResponse Server → Administrator → Administrator.
- 2 Log on as an administrator with the User ID “sysadmin,” the Password “nortel,” and the Access Class “administrator,” and then click OK.

- 3 Click the plus sign (+) next to E-mail Administration, and then double-click E-Mail Configuration.



- 4 Click New.



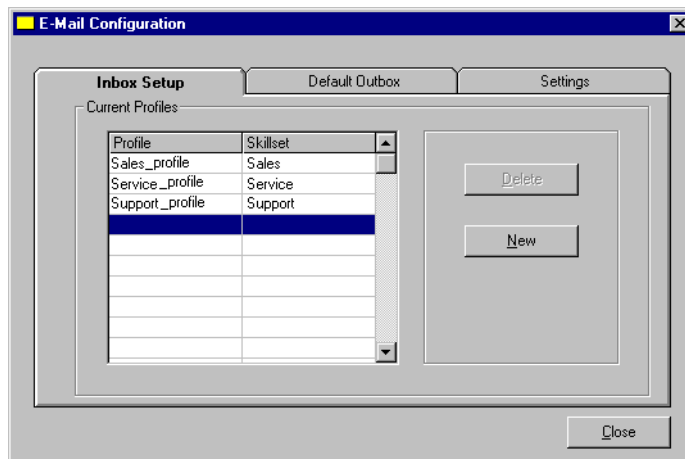
- 5 In the Profile box, enter the name of an Exchange profile exactly as you entered it on page 36.
Note: Profile names are case-sensitive.
- 6 In the Password box, enter the password that the mailbox user enters to log on to the Exchange Server to get mail.
- 7 In the Skillset box, select the skillset to which new transactions arriving by e-mail for this profile will be routed. In the example shown above, mail for the sales_profile profile (sales@letronix.com) is routed to the sales skillset.

- 8 Click Check Name to verify that the profile and password match an existing profile.

Note: Check Name only appears if the Mail Monitors are running on the same PC as Symposium WebResponse Server.

- 9 When the name is confirmed, click OK. If the name is not confirmed, correct the profile and password, and try again.
- 10 Click Apply.

Result: The Profile and the skillset to which it is mapped appear in the Current Profiles box.



- 11 Repeat steps 4 to 10 for each profile.

Changing the default outbox

Introduction

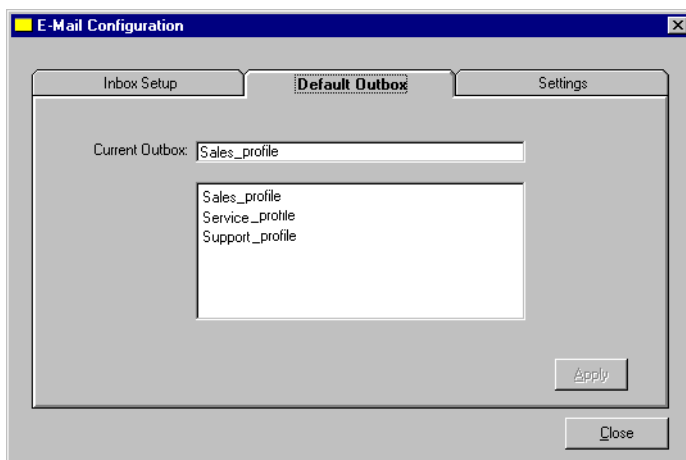
When agents reply to customer requests using e-mail, all of the outbound messages that every agent sends are placed into a single mailbox. The Symposium WebResponse Server setup creates a default outbox. If you do not want to use the default, follow this procedure to change the outbox.

Tip: You can create a general mailbox account for outbound mail so that customers see your reply coming from a mailbox name representing your company. For example, customers who send inquiries to sales@letronix.com and support@letronix.com both see responses generated from info@letronix.com.

To configure the default outbound mailbox

- 1 From the Windows Start menu, choose Programs → Nortel Networks - Symposium WebResponse Server → Administrator → Administrator.
- 2 Log on as an administrator with the User ID “sysadmin,” the Password “nortel,” and the Access Class “administrator,” and then click OK.
- 3 Click the plus sign (+) next to E-mail Administration, and then double-click E-Mail Configuration.

- 4 Click the Default Outbox tab.



- 5 Select the mail profile that you want to use as the default outbox.
- 6 Click Apply.
- 7 Stop and restart the mail monitors. For more information, see "Starting the Mail Monitors" on page 111.

Result: All outbound e-mail is sent from the profile shown in the Current Outbox box.

Creating and sharing e-mail attachment directories

Introduction

When agents receive or send e-mails that include file attachments, the attached files are stored in special Inbound and Outbound directories on the database server. You can designate any directory on the Mail server to store file attachments. These folders must be on the same PC as the Mail Monitors.

To view or otherwise process the attached files, agents must have access rights to these directories. This access is provided by sharing the directories to the agents.

After you create and share the attachments directories, you must designate the directories in the Symposium WebResponse Server Administrator.

Handling attached files

Inbound files

If an e-mail message arrives with an attached file, the message portion is inserted into the Symposium WebResponse Server database as per normal. However, the attached file is stored in a special directory on the computer that is running Symposium WebResponse Server. You can configure the directory in which the attachments are stored by using the E-Mail Configuration screen on the Settings tab. The prefix to the name of the inbound file identifies the transaction number to which the file belongs. For instance, the file called trbl.rpt that is attached to the message assigned transaction number 29981 is renamed as 29981_trbl.rpt in the Inbound directory.

To view, copy, or otherwise process attached files, agents must have access rights to the directory on the server where the files are stored. As part of the e-mail configuration, share the attachment directory on the server. At each workstation, map the shared directory as a network drive so that each agent can retrieve attachments.

Outbound files

When an agent needs to attach a file to an outbound message, the agent must copy the file to the server's designated attachments directory. You can configure the directory in which the attachments are stored by using the E-Mail Configuration screen on the Settings tab. After copying the file to the server, the agent can create the e-mail response and then include the file as an attachment.

Note: For further information on sharing network directories and mapping network drives, see the topics "Sharing folders" and "Mapping network drives" in Windows online Help.

To share the attachments directories

- 1 Log on to the Symposium WebResponse Server Administrator with administrator privileges.
- 2 Using Windows Explorer, create the new folder in which you want to store file attachments (for example, C:\SWRSMail).
- 3 Right-click on the folder name, and then choose Sharing.

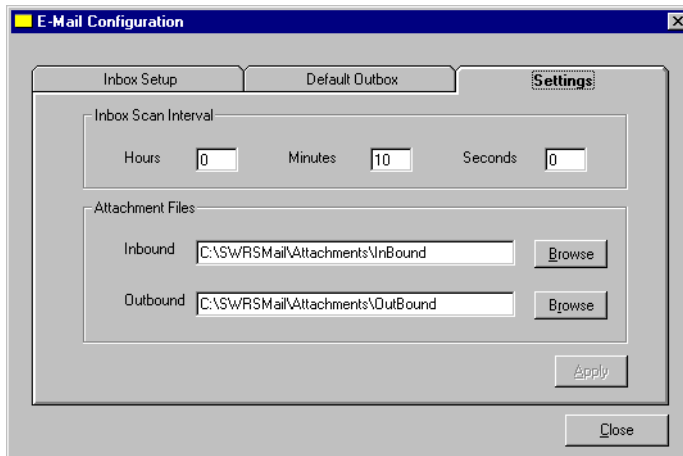


- 4 Select Shared As, and then enter the name you want agents to see for this folder (for example, File Attachments).
- 5 In the Comment box, enter SWRS File Attachments.

- 6 Click Permissions, and ensure that all users who send and receive e-mail have at least Change access to this shared directory. The default permission is Full Control for the Everyone group.
- 7 Click OK twice.

To designate the e-mail attachments directories

- 1 From the Windows Start menu, choose Programs → Nortel Networks - Symposium WebResponse Server → Administrator → Administrator.
- 2 Log on as an administrator with the User ID “sysadmin,” the Password “nortel,” and the Access Class “administrator,” and then click OK.
- 3 Click the plus sign (+) next to E-mail Administration, and then double-click E-Mail Configuration.
- 4 Click the Settings tab.



- 5 Click the Browse button beside the Inbound box, and then select the directory for inbound file attachments.
- 6 Click the Browse button beside the Outbound box, and then select the directory for outbound file attachments.
- 7 Click Apply.

Configuring the e-mail scan interval

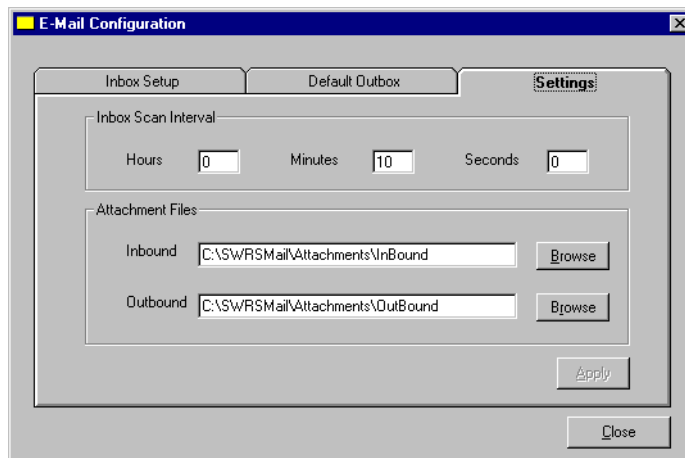
Introduction

The Symposium WebResponse Server Mail Monitors scan for inbound mail and outbound mail at set intervals. The interval between scans depends on your needs and your system resources. Scanning too frequently can place an unnecessary load on your server. Scanning too infrequently can mean that messages are not transferred to agents quickly enough.

The allowed range for a scan interval is one minute to 24 hours. A typical interval is 10 minutes.

To configure the e-mail scan interval

- 1 From the Windows Start menu, choose Programs → Nortel Networks - Symposium WebResponse Server → Administrator → Administrator.
- 2 Log on as an administrator with the User ID “sysadmin,” the Password “nortel,” and the Access Class “administrator,” and then click OK.
- 3 Click the plus sign (+) next to E-mail Administration, and then double-click E-Mail Configuration.
- 4 Click the Settings tab.



- 5 Enter the interval between e-mail scans in hours, minutes, and seconds.
- 6 Click Apply.
- 7 Click Close.

Starting the Mail Monitors

Introduction

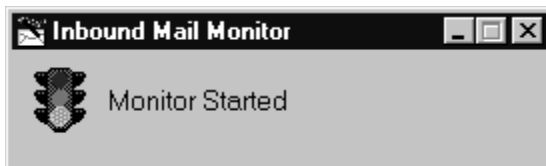
The two Symposium WebResponse Server Mail Monitors run as applications. They scan the inbound and outbound mailboxes for e-mail messages and attachments. Whenever an e-mail message appears in the inbox, Symposium WebResponse Server converts the message into a call center transaction.

Notes:

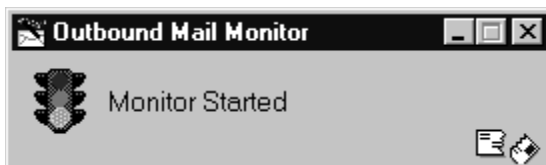
1. You must restart the Mail Monitors whenever the computer is restarted.
2. Make sure that the Microsoft Exchange or Lotus Notes client application is installed, configured, and running on the computer that runs Symposium WebResponse Server.

To start the Mail Monitor applications

- 1 To open the Inbound Mail Monitor, choose Programs → Nortel Networks - Symposium WebResponse Server → Administrator → Mail Monitors → InBound Mail Monitor from the Windows Start menu.



- 2 To open the Outbound Mail Monitor, choose Programs → Nortel Networks - Symposium WebResponse Server → Administrator → Mail Monitors → OutBound Mail Monitor from the Windows Start menu.



Mail Monitor status indicators

The following list describes the status indicators that appear on the Inbound and Outbound Mail Monitor windows.

The lights on the Mail Monitor windows change as the monitors scan different mailboxes.

- A green light indicates that the Mail Monitor is connected to both the database and the mail servers.
Green is the normal status.
- A yellow light indicates that the Mail Monitor is connected only to the database server.
- A red light indicates that the Monitor is not connected to the database or the mail server.
- A broken envelope in the bottom right of the window indicates that the Mail Monitor is not sending mail because it is in Sleep mode.
This is the normal status.
- An unbroken envelope indicates that the Mail Monitor is checking or sending mail.

Setting up automatic replies

Overview

You can create messages that Symposium WebResponse Server automatically returns in response to incoming messages from customers. For example, an automatic reply can acknowledge the receipt of a customer's message and indicate that an agent will follow up with a personal reply.

You can create a different automatic acknowledgement for each skillset.

In addition to sending a static message as auto acknowledgement text, you can include the date, data from the customer's transaction record, and file attachments. You can create your own date format using a combination of existing formats.

Handling invalid transactions

You can create an automatic acknowledgement for invalid transactions. An invalid transaction matches these characteristics:

- The subject field of the sender's e-mail message contains a number inside Symposium WebResponse Server transaction delimiters, such as <[4992]>. and
- Symposium WebResponse Server cannot find the transaction number inside the delimiters in the database.

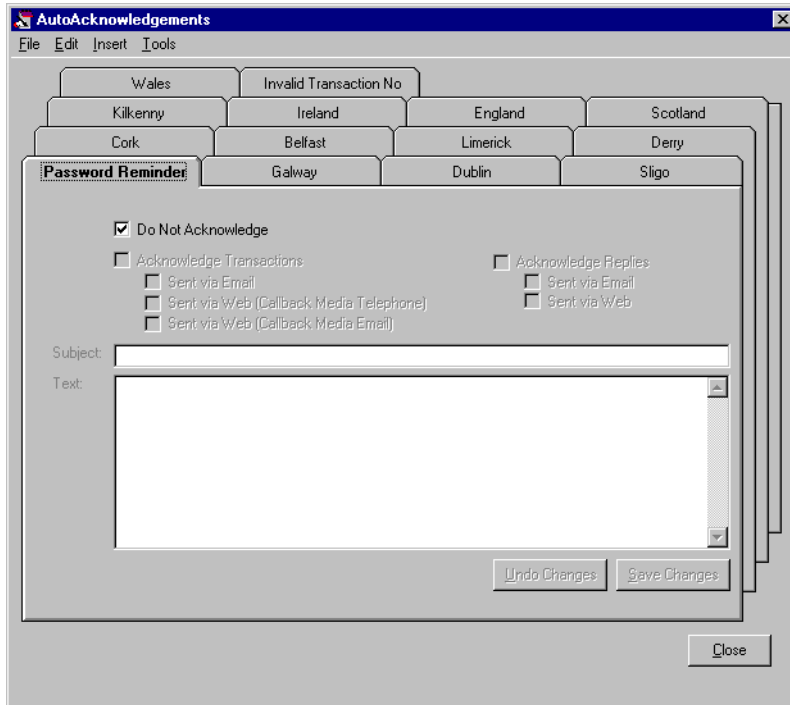
You can handle invalid transaction numbers by sending an error message or by ignoring the invalid transaction number and accepting the message as a new transaction.

Notes:

1. If the transaction number is found in the database, then there is no error and normal processing continues.
2. If there are no Symposium WebResponse Server transaction delimiters in the subject field, then the message is treated as a new transaction and there is no error.

To create an auto acknowledgement message

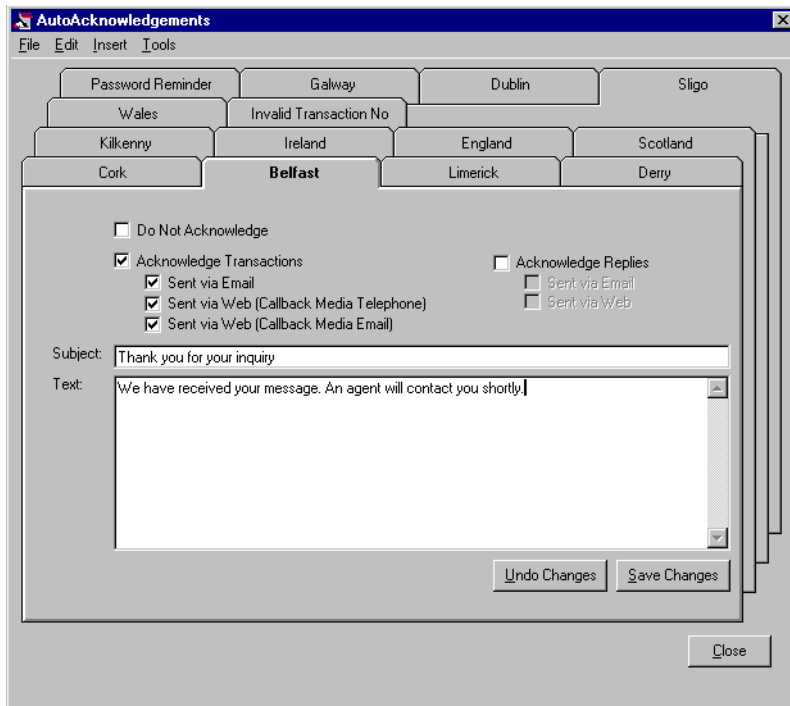
- 1 Log on to Symposium WebResponse Administration.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to E-mail Administration.
- 4 Double-click Auto Acknowledgement.



- 5 Select the tab of the skillset for which you want to send auto acknowledgement text.
- 6 Clear the Do Not Acknowledge check box and check the Acknowledge Transactions check box.
- 7 Select the conditions under which you want to acknowledge transactions. Select as many conditions as apply.
- 8 In the Subject box, type the subject of the automatic reply (for example, Request Received).

- 9 In the Text box, type the message that you want to send automatically when a message arrives for this skillset.

Tip: To use the built-in spelling checker to check your message, choose Tools → Spelling.

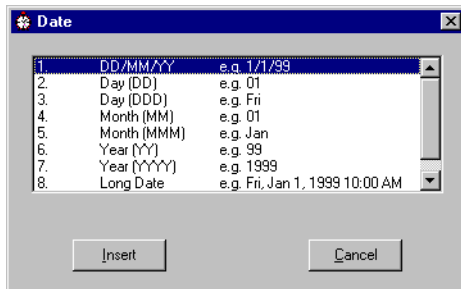


- 10 If you want to include an attachment with the message, choose Insert → Attachment Files, and then select the file to attach.
- 11 Click Save Changes, and then click Close.

To insert data into an auto acknowledgement message

- 1 Log on to Symposium WebResponse Server Administration.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to E-mail Administration.
- 4 Double-click Auto Acknowledgement.

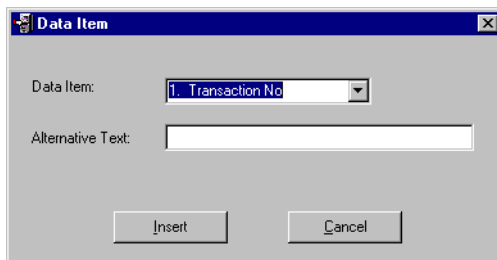
- 5 Select the tab of the skillset with the auto acknowledgement message that you want to insert data into.
- 6 Choose Insert → Date.



- 7 Select a date and time format, and then click Insert.

Result: The code for the date or time appears in the message. Symposium WebResponse Server inserts the current date or time when it sends the message.

- 8 Choose Insert → Data Item.



- 9 Select the field that you wish to insert (for example the transaction number, or the customer's e-mail address).
- 10 In the Alternative text box, type the text that should appear if the selected field is not available for insertion.
- 11 Click Insert.

Result: The code for the selected field appears in the message text. In the auto acknowledgement message, Symposium WebResponse Server queries the transaction record and inserts the value(s) found in the selected field(s).

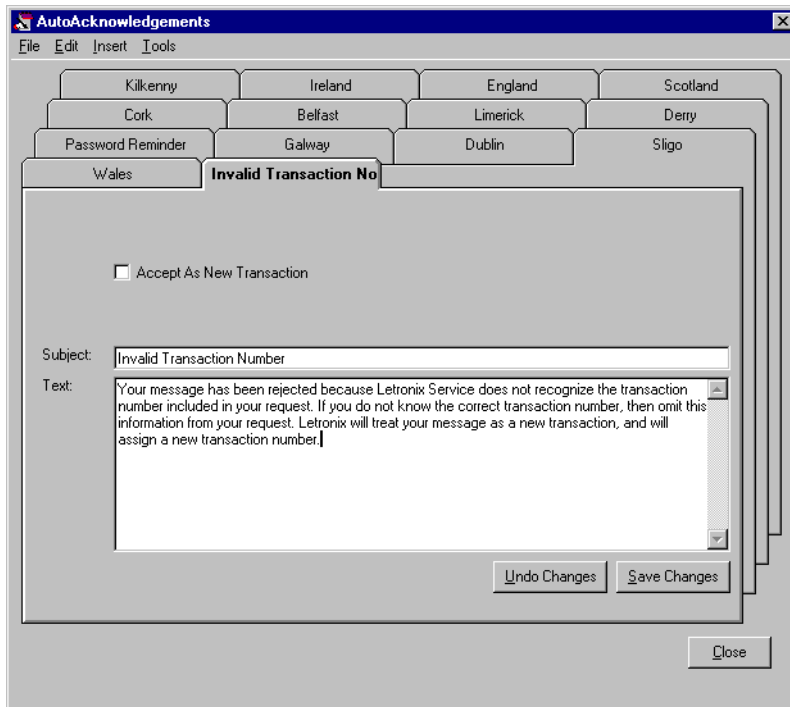
To accept messages with invalid transaction numbers

- 1 Log on Symposium WebResponse Server Administration.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to E-mail Administration.
- 4 Double-click Auto Acknowledgement.
- 5 Select the Invalid Transaction No. tab.
- 6 Check Accept As New Transaction.
- 7 Click Save Changes, and then click Close.

To reject messages with invalid transaction numbers

- 1 Log on to Symposium WebResponse Server Administration.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to E-mail Administration.
- 4 Double-click Auto Acknowledgement.
- 5 Select the Invalid Transaction No. tab.
- 6 Clear the Accept As New Transaction check box.
- 7 In the Subject box, type the heading for the error message (for example "Invalid Transaction Number").
- 8 In the Text box, type an explanation for the rejection of the message.

For example, you can indicate that if the sender is unsure of the original transaction number, he or she should leave the number out and a new transaction will be created.



- 9 Click Save Changes, and then click Close.

Note: Messages that do not include a transaction number are automatically accepted by the system as new transactions. Auto acknowledgement error text is only sent when the sender has entered an incorrect transaction number in the Subject line, and used the Symposium WebResponse Server transaction delimiters, such as <[4992]>.

Setting up personalized signatures

When to use

A personalized signature is text that is automatically added at the bottom of an outgoing message. For example, you can encourage customers to visit your customer support web site by adding the URL and other promotional information to every message.

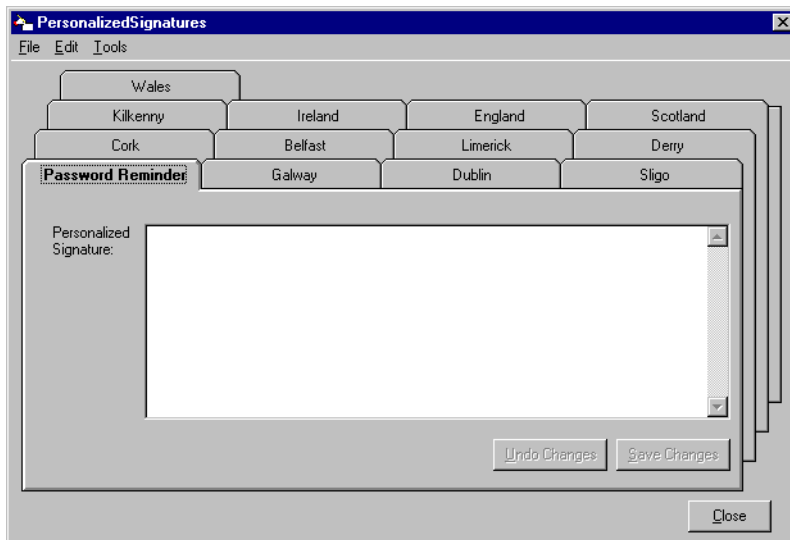
Note: Agents do not see the personalized signature as they are composing a message.

You can create a different signature for each skillset. You can also create a template for personalized signatures that you can use for different skillsets.

Creating personalized signatures

- 1 Log on to Symposium WebResponse Server Administration.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to E-mail Administration.

4 Double-click Personalized Signatures.



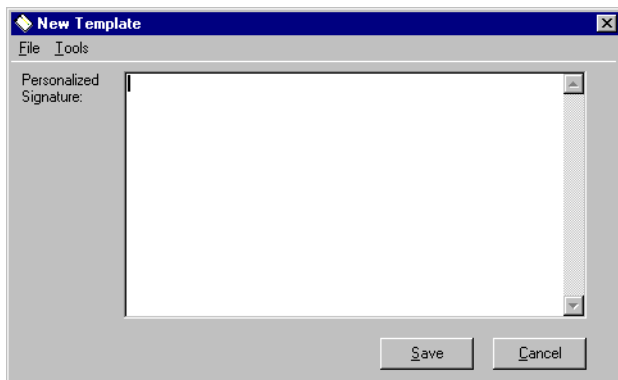
- 5 Select the tab of the skillset for which you want to add personalized signature text.
 - 6 Choose one of the following options to enter text into the Personalized Signature box:
 - Type the message that you want to add automatically to all outbound messages from this skillset.
 - Choose File → Open Template to use template text. Locate the template you want to use, and then click Open.

Result: The template text is automatically inserted into the Personalized Signature box.
 - 7 Click Save Changes, and then click Close.
- Tip:** To use the built-in spelling checker to check your message, choose Tools → Spelling.

To create a personalized signature template

- 1 Log on to Symposium WebResponse Server Administration.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to E-mail Administration.

- 4 Double-click Personalized Signatures.
- 5 Choose File → New Template.



- 6 Enter the text for the Personalized Signature template, and then click Save.
- 7 Enter a name for the template.
- 8 Choose a location in which to save the template, and then click Save.

Chapter 6

Using real-time displays and reports

In this chapter

Viewing real-time displays	124
Running and printing reports	128
Archiving and restoring data	131

Viewing real-time displays

Introduction

Real-time displays provide up-to-date statistics about the current status of calls, resources, and agents in your call center. By monitoring the ongoing performance of your system, you can maximize the effectiveness of your call center.

You can view real-time displays for the following statistics:

- Agents available
- Agents in service
- New calls waiting
- Open calls waiting
- Pending calls waiting
- Longest wait time
- Average handle time

Thresholds

To improve the impact of your real-time displays, Symposium WebResponse Server allows you to set threshold values for seven quality service indicators, such as the longest waiting time.

Thresholds warn supervisors, administrators, and agents when intervention is required—for example, if a skillset requires additional agents. You can define thresholds for statistics in real-time displays. The thresholds specify the values for the low and the high end of the normal range.

For each threshold, you can use colors to identify whether the value of the statistics is less than the low value, between the low and the high value, or greater than the high value.

If you do not set threshold values, you will not see them as part of your real-time displays.

For example, you can set a service threshold to determine whether agents are responding promptly to requests. Your real-time display changes color to alert you whenever a value exceeds the threshold level that you have set.

Real-time display thresholds example

Here is an example of how thresholds work with displays:

Doris Kramer, the supervisor of a call center, wants to make sure that confirmed orders that come in from the Internet are handled promptly and ahead of requests for information.

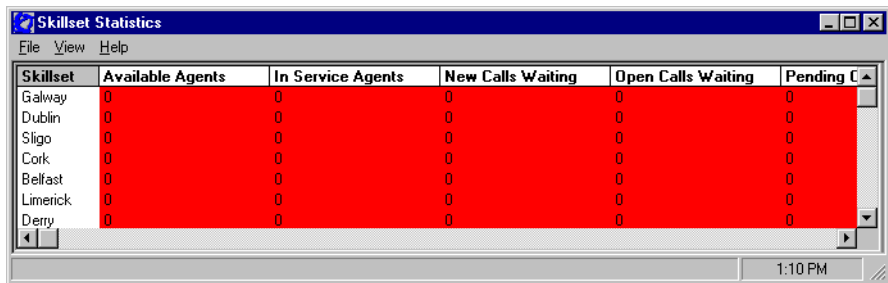
Two agents are assigned to handle all of the messages that are directed by Symposium WebResponse Server to the skillset called NetOrder. To maintain good service, Doris wants to know whenever there are more than 30 unfilled orders that have come in from the web.

Doris sets a threshold of 30 for the Pending Calls Waiting statistic. After this change, the real-time display on Doris' screen changes color to alert her to the fact that orders are piling up. She investigates why the normal high level of efficiency has fallen off and takes measures to reduce the backlog on orders. One of the measures she takes is to assign an additional agent to the NetOrder skillset.

To view real-time displays

- 1** From the Symposium WebResponse Server Administration window, click the plus sign (+) next to Symposium WebResponse Server.
- 2** Click the plus sign (+) next to Reports & Displays.
- 3** Click the plus sign (+) next to RTD.
- 4** Double-click Real Time Skillset Statistics.

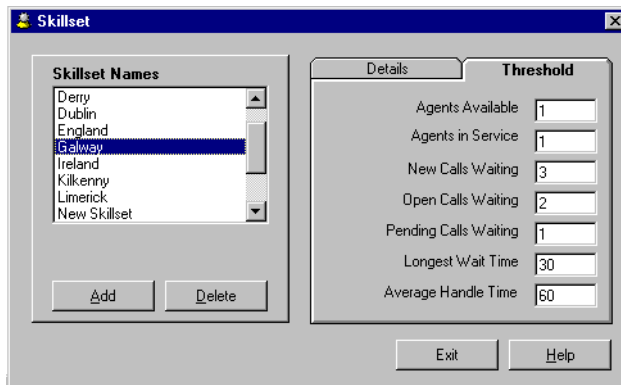
Result: The Skillset Statistics window appears.



Skillset	Available Agents	In Service Agents	New Calls Waiting	Open Calls Waiting	Pending C
Galway	0	0	0	0	0
Dublin	0	0	0	0	0
Sligo	0	0	0	0	0
Cork	0	0	0	0	0
Belfast	0	0	0	0	0
Limerick	0	0	0	0	0
Derry	0	0	0	0	0

To set the thresholds for a real-time displays

- 1 From the Symposium WebResponse Server Administration window, click the plus sign (+) next to Symposium WebResponse Server.
- 2 Click the plus sign (+) next to System Administration.
- 3 Double-click Skillsets.
- 4 In the Skillset Names box, select the skillset for which you are setting a threshold.
- 5 Select the Threshold tab.



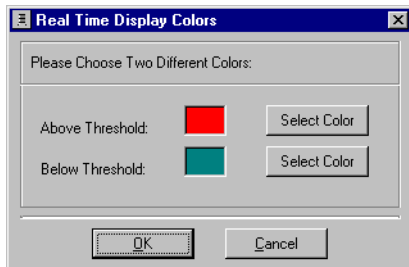
Skillset Names	Details	Threshold
Derry		
Dublin		
England		
Galway		
Ireland		
Kilkenny		
Limerick		
New Skillset		

Agents Available: 1
 Agents in Service: 1
 New Calls Waiting: 3
 Open Calls Waiting: 2
 Pending Calls Waiting: 1
 Longest Wait Time: 30
 Average Handle Time: 60

- 6 Enter the threshold value for the level of service. For example, if you enter a value of 5 in the Agents Available box, you indicate that you want the real-time display to change color when fewer than five agents are available for the selected skillset.

To set the threshold colors

- 1 From the Symposium WebResponse Server Administration window, click the plus sign (+) next to Symposium WebResponse Server.
- 2 Click the plus sign (+) next to Reports & Displays.
- 3 Click the plus sign (+) next to RTD.
- 4 Double-click Real Time Display Colors.



- 5 Click Select Color to choose the colors you want to use in the real-time displays when values fall below the lower threshold and above the upper threshold.

Running and printing reports

When to use

Reports help you monitor your system performance by providing information on system activity. You can use reports to

- analyze productivity and efficiency
- assess staffing requirements
- identify trends
- identify seasonal behavior
- forecast future activity
- enhance service

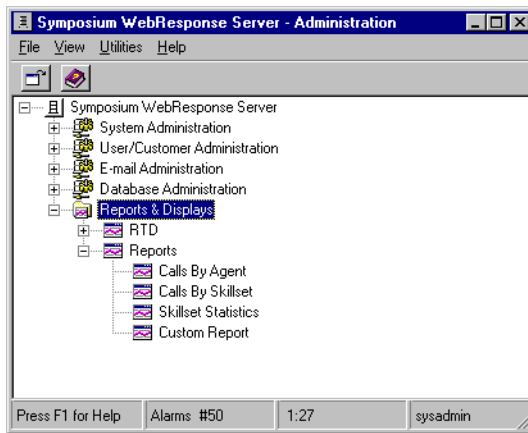
Forecasting is especially helpful for predicting changes in call center traffic. For example, if a retailer's annual summer sale traditionally brings higher call volumes, detailed reports can help the center prepare for future sales. Similarly, tracking seasonal business trends makes it easier to manage staffing requirements from one year to the next.

You can use predefined standard reports or create your own customized reports.

To run and view reports

- 1 Click the plus sign (+) beside Symposium WebResponse Server.
- 2 Click the plus sign (+) beside Reports and Displays.

- 3 Click the plus sign (+) beside Reports.



- 4 Double-click the report that you want to view.

Result: The report opens. You can now print or save the report.

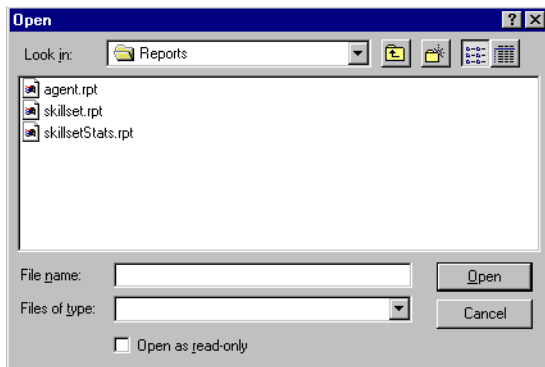
To run customized reports

- 1 Create the report layout for your custom report using Crystal Reports.
- 2 Save your report in the c:\Program Files\Nortel\Symposium WebResponse Server\Administrator\Reports directory.

Note: Give the report an .RPT extension.

- 3 Click the plus sign (+) beside Symposium WebResponse Server.
- 4 Click the plus sign (+) beside Reports and Displays.
- 5 Click the plus sign (+) beside Reports.

6 Double-click Custom Report.



7 Select the name of the custom report in the Open dialog box.

8 Click Open to run the report.

To print reports

- 1 Run the report that you want to print, following the instructions in “To run and view reports” on page 128.
- 2 Click the Print icon at the top of the window.
- 3 Select the printer, page range to print, and number of copies.
- 4 Click OK.

Archiving and restoring data

When to use

Follow the procedures in this section to archive and restore system data. You can save daily data for customer sessions, transactions, or customer information. This information is saved as a file that you can restore later in case of an emergency.

Note: You must log on to Symposium WebResponse Server as an administrator to archive and restore data.

To archive data

- 1 Log on to Symposium WebResponse Administrator as an administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to Database Administration.
- 4 Double-click Archive.

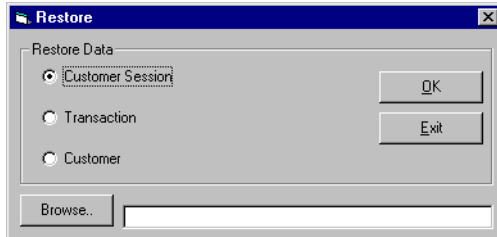
Result: The Archive Data window appears.



- 5 Choose the type of data you want to archive. Select one of
 - Customer session
 - Transaction
 - Customer
- 6 Select the date for which you want to save data.
- 7 Click Browse, and then choose a location in which to save the archive.
- 8 Click Archive.
- 9 Click Exit to close the Archive Data window.

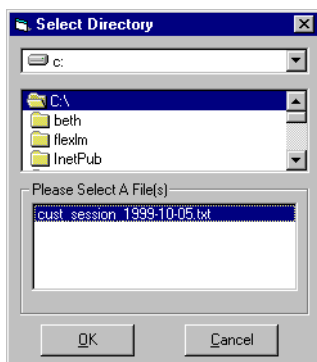
To restore data from an archive

- 1 Log on to Symposium WebResponse Administrator as an administrator.
- 2 Click the plus sign (+) next to Symposium WebResponse Server.
- 3 Click the plus sign (+) next to Database Administration.
- 4 Double-click Restore.



- 5 Choose the type of data you want to restore. Select one of
 - Customer session
 - Transaction
 - Customer

- 6 Click Browse, and then choose an archive file to restore.



- 7 Click OK to return the Restore window.
- 8 Click OK to restore the archived data.

Chapter 7

Understanding agent tasks

In this chapter

Performing agent tasks

136

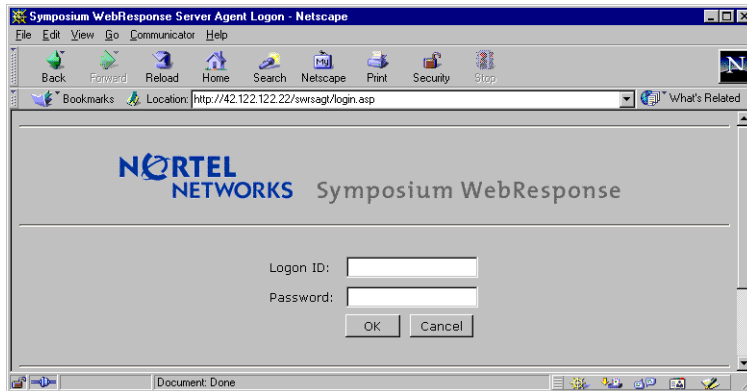
Performing agent tasks

Introduction

This chapter describes the tasks that agents perform in the Agent Interface of Symposium Web Response Server. Administrators and supervisors need to understand these tasks to perform their own administrative responsibilities.

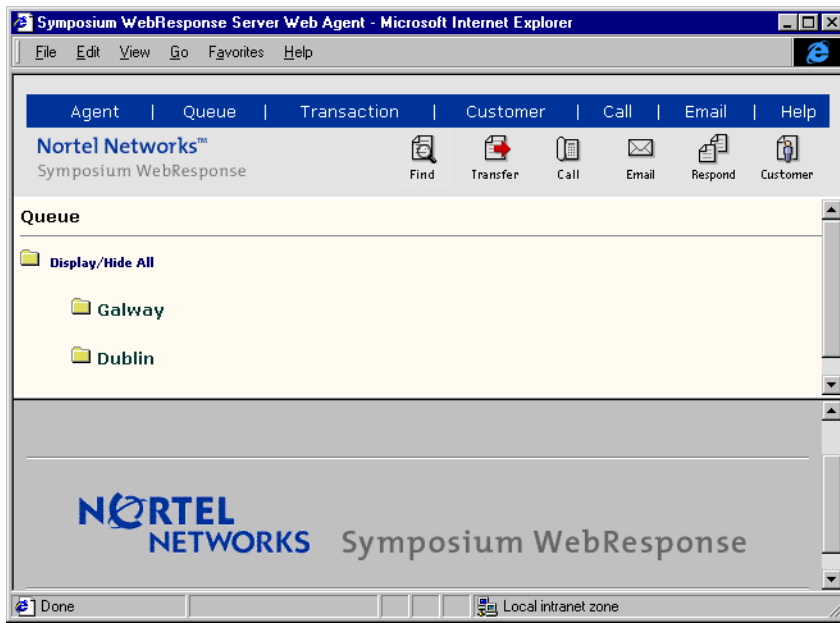
To log on to Symposium WebResponse Server

- 1 Using your web browser, navigate to your Symposium WebResponse Server address.



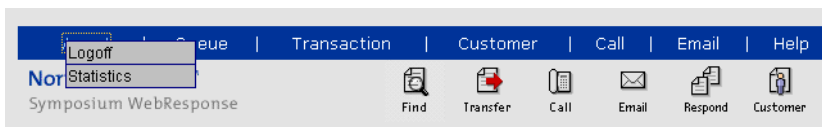
- 2 Enter your logon ID and password.
- 3 Click OK.

Result: The Agent Interface appears.



To log off of Symposium WebResponse Server

Choose Agent → Logoff from the toolbar.

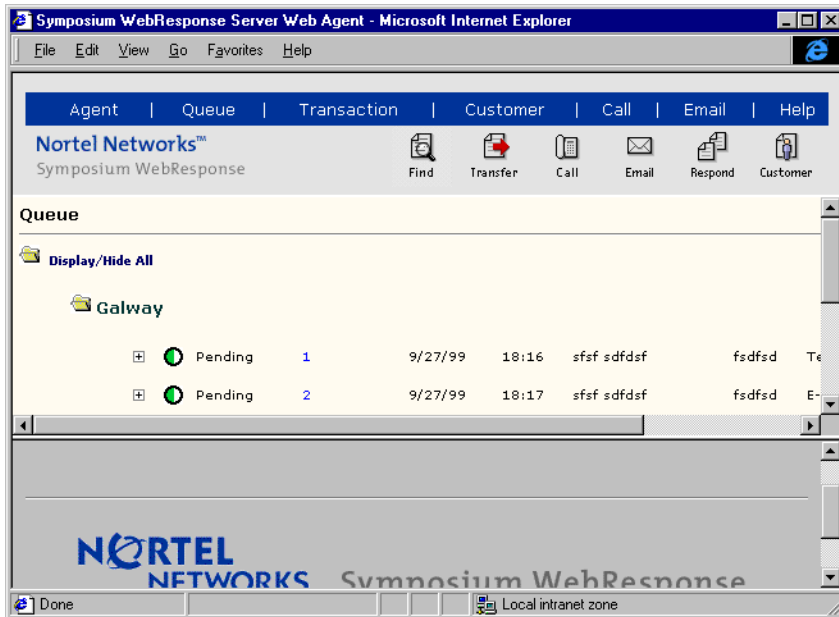


Note: If an agent logs out by closing the browser or by clicking the Home toolbar button, the agent is disconnected and cannot log in again until the timeout period has passed, or the administrator resets his or her logon status. For information about resetting the logon status, see “To log users off of the system” on page 84.

To select a transaction

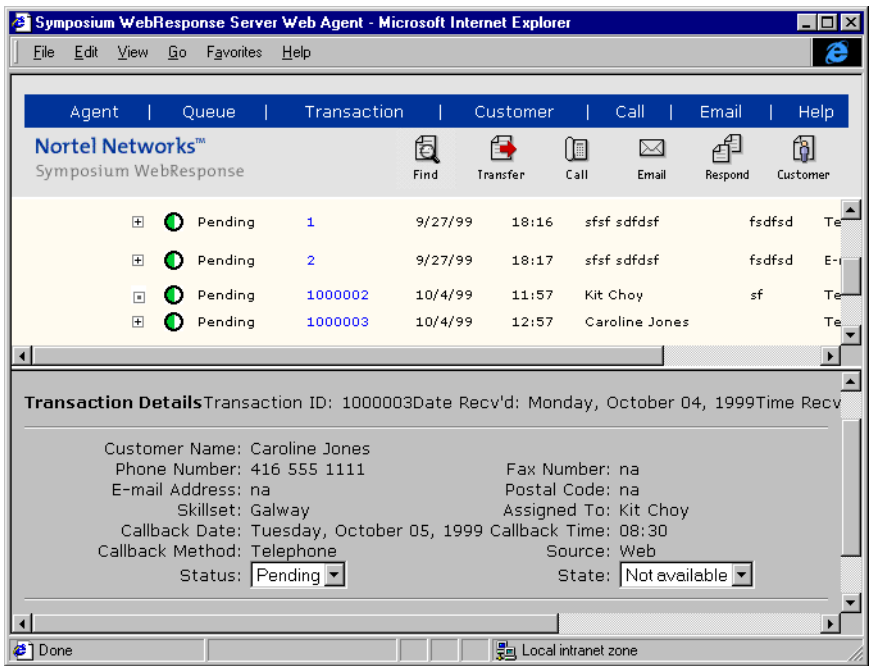
- 1 In the Queue frame (the middle section of your browser), click the Display All icon.

Result: The icon changes to an open folder, and all of the skillsets, and transactions within those skillsets, are visible.



- 2 Click the number (a hyperlink) of the transaction that you want to display.

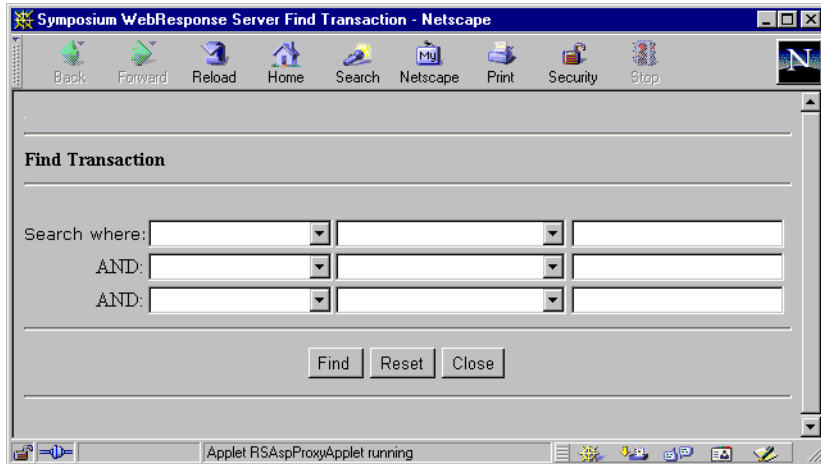
Result: The transaction opens in the lower frame.



To find a transaction

- 1 Click the Find button.

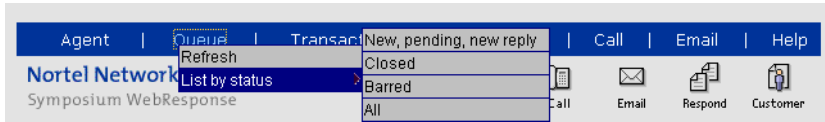
Result: The Find Transaction window opens.



- 2 In the first column, select the search criteria (for example, Customer Surname).
- 3 In the second column, select the restriction for the search (for example, equals).
- 4 In the third column, type the text, name, number, or date that you want to find.
- 5 Click Find.
Result: The results of your search appear.
- 6 If the search results are satisfactory, click the Transaction ID to open the transaction.
- 7 If you want to refine your search, click Back.
- 8 Click Close.

To list transactions by status

Choose Queue → List by status, and select the status by which you want to sort the transactions.



To reply to a customer request by e-mail

- 1 Select the transaction that you want to reply to.
- 2 Click the e-mail button.

Result: The e-mail window opens.

 A screenshot of a web browser window titled 'Symposium WebResponse Server Email Response Frame Window - Microsoft Internet Explorer'. The page header shows the Nortel Networks logo and 'Symposium WebResponse'. There are four icons in the top right: Send (with a red arrow), Template, Save As, and Attach. The main content area displays:

- Response ID: 1000009
- Transaction ID: 1000002
- Customer Name: Kit Choy
- Email Address: [text input field]
- Subject: [text input field]
- Email Body: [large text area]
- Selected Attachment: [text input field] with a 'Browse...' button to its right.
- Below the attachment field is an 'Attach selected file' button.
- Attachment List: [text area]

 The status bar at the bottom shows 'Done' and 'Local intranet zone'.

- 3 Type the customer's e-mail address, the subject of the message, and the message text.

- 4 Click Send.

Result: The e-mail window closes and the content of your message is added to the transaction trail.

To reply to a customer request by telephone

- 1 Select the transaction that you want to reply to.
- 2 Click the Call button.

Result: The call window opens.

The screenshot shows a web browser window titled "Symposium WebResponse Server Phone Response Frame Window - Microsoft Internet Explorer". The page header includes the "Nortel Networks™ Symposium WebResponse" logo and four buttons: "Dial", "Release", "Transfer", and "Conference". Below the header, the "Response ID: 1000010" and "Transaction ID: 1000002" are displayed. The "Customer Name: Kit Choy" is shown. The "Phone Number:" field contains "1 213 555 2312". The "Callback Status:" dropdown menu is set to "Response Cancelled". The "Response Text:" area is a large, empty text box. The "Agent Notes:" area is a smaller, empty text box. At the bottom of the window, there is a status bar with "Done" and "Local intranet zone" indicators.

- 3 Type the customer's telephone number.
 - 4 Click the Dial button.
- Result:** The telephone dials the customer's number.
- 5 After your conversation, click the Release button to hang up the telephone.
 - 6 Update the Callback Status (for example, to Call Completed).
 - 7 In the Response Text area, type a summary of the conversation.

- 8 Click the Save button.

Result: The call window closes.

To update customer data

- 1 Select a transaction that belongs to the customer.
- 2 Click the Customer button.

Result: The Customer Details window opens.

Symposium WebResponse Server Web Agent - Customer Details - Microsoft Internet Explorer

Nortel Networks™
Symposium WebResponse

Bar History

Customer Details Customer Id: 1000004 Register Date: Monday, October 04, 1999

First Name: Last Name:

Address 1:

Address 2:

Address 3:

Address 4:

Address 5:

Postal Code:

Phone Area Code: Phone Number:

Fax Area Code: Fax Number:

Phone Number Intl Code: Fax Number Intl Code:

E-mail Address:

Save Close

Opening page http://47.198. Local intranet zone

- 3 Make the changes you require to the customer's record.
- 4 Click Save.
- 5 Click Close.

Result: The Customer Details window closes.

To log fax, mail, or courier responses

- 1 Select a transaction that belongs to the customer.
- 2 Click the Respond button.

Result: The Response Detail window opens.

Symposium WebResponse Server General Response Detail - Microsoft Internet Explorer

Response ID: 1000011 Transaction ID: 1000003

Customer Name: Caroline Jones

Callback Status:

Response Method:

Response Text:

Agent Notes:

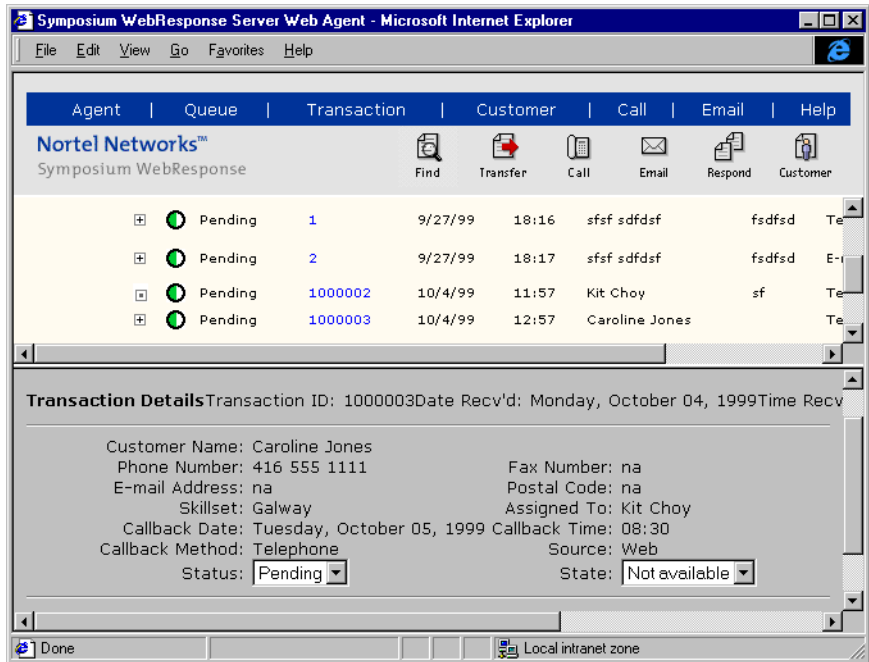
Done Local intranet zone

- 3 Update the callback status.
- 4 In the Response Method box, select the type of response (for example, Fax).
- 5 In the Response Text box, type a summary of the response.
- 6 Click the Save button.

Result: The Response Detail window closes.

To change transaction status

- 1 Select a transaction that you want to change.

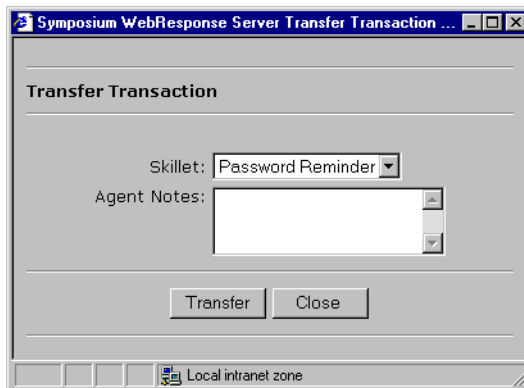


- 2 In the Transaction Details pane, change the Status field to Pending or Closed.
- 3 Click Save.

To transfer transactions

- 1 Select the transaction.
- 2 Click the Transfer button.

Result: The Transfer Transaction window opens.



- 3 Select the skillset to which you want to transfer this transaction.
- 4 Type a brief note about the reason for the transfer.
- 5 Click Transfer.

Result: The Transfer Transaction window closes.

To close transactions

- 1 Select the transaction that you want to close.
- 2 In the Transaction Details pane, change the status to Closed.
- 3 Click Save.

To add an attachment to an e-mail message

- 1 Use Windows Explorer to copy the file that you want to attach into the shared files folder that your administrator has created. For more information, refer to “Creating and sharing e-mail attachment directories” on page 106.
- 2 Select the transaction that you want to reply to.
- 3 Create the e-mail message.
- 4 Click the Browse button.
- 5 Locate the attachment directory, and select the file that you want to attach.
- 6 Click Open.

Result: The path and the name of the file appear in the Selected Attachments field.

- 7 Click Attach selected file.
- 8 The name of the file that appears in the Attachment List.
- 9 Repeat steps 4 to 7 for each file that you want to attach to the message.
- 10 When you are ready to send the e-mail message with the attachment, click Send.

To create templates for responses

- 1 Create the e-mail message.
- 2 In the E-mail Body box, type the text that you want to save as a template response.
- 3 Click the Save As button.
- 4 Navigate to the folder where you want to store the template response file.
- 5 Save the file using a descriptive name (for example, WarrantyURL.txt).

To use a template response

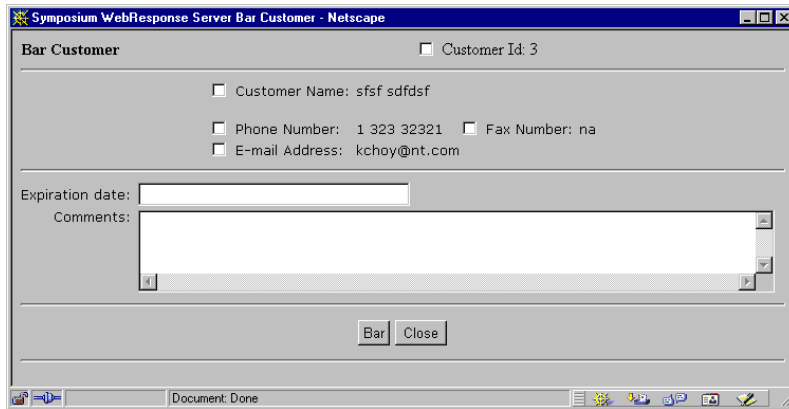
- 1 Create the e-mail message.
- 2 Click the Template button.
- 3 Navigate to the folder where your template response is stored.
- 4 Select the template file, and then click Open.
Result: The text from the template appears in the e-mail Body box.
- 5 If necessary, edit the text.
- 6 When you are ready to send the e-mail message with the message, click Send.

To bar customers

- 1 Select a transaction that belongs to the customer that you want to bar.
- 2 Click the Customer button.

Result: The Customer Details window opens.

- 3 Click the Bar button.



- 4 Check the criteria on which you want to detect and block messages from this customer. For example, you can instruct Symposium WebResponse Server to block all messages from the customer's e-mail address.
- 5 In the Comments box, type an explanation for barring this customer.
- 6 In the Expiration Date box, type the date when this customer should be unbarred (for example 10/10/1999).
- 7 Click Bar.

Note: Only a supervisor or administrator can unbar a customer. For instructions, see "To remove customers from the barred list" on page 88.

To view customer histories

- 1 Select a transaction that belongs to the customer.
- 2 Click the Customer button.

Result: The Customer Details window opens.

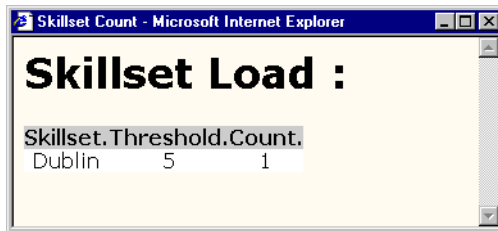
- 3 Click the History button.

Result: The Transaction History window opens.

To view skillset statistics

Choose Agent → Statistics from the toolbar.

Result: The Skillset Statistics window appears.



Note: This window shows statistics for the skillsets that you configure when you create the agent ID. For more information, see “To add agents” on page 80.

Chapter 8

Upgrading and uninstalling the software

In this chapter

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Upgrading the software

When to use

Follow the instructions in this section to upgrade from Symposium WebResponse Server Release 1.0 to Release 2.0.

Before you begin

- Ensure that the Real-time and Transaction Monitor services are not running.
- Disable SWRS Monitor and SWRS Real-time service in the Service Control Manager.

To upgrade the database

- 1 Follow the instructions in “Installing the Database component” on page 32 to install the Symposium WebResponse Server Release 2.0 database.

Note: You can install the database on the existing Symposium WebResponse Server Release 1.0 database server, or on a new server. This installation does not overwrite any data in the existing Release 1.0 database.

- 2 Run the database upgrade utility from the Nortel Networks Symposium WebResponse Server CD-ROM. To do so, locate and double-click Upgrde.exe in d:\Utilities\Data Transfer, where d: is your CD-ROM drive.

Result: This utility copies all of the data in your current database to a set of files. You can find these files in the following directories:

<Sybase dir>\bin\SQLScripts\upgrade\data

<Sybase dir>\bin\SQLScripts\upgrade\log

<Sybase dir>\bin\SQLScripts\upgrade

where <Sybase dir> is the directory in which you installed Sybase.

- 3 If your existing database server for Release 1.0 is not going to be the database server for Release 2.0, you must copy these files to the new server and run the upgrade utility again.

Note: Copy the files to the same full path name on the new server.

- 4 Run the utility Upgrade.exe again from the installation CD on your Symposium WebResponse Server Release 2.0 database server.

Result: This utility now looks for the Release 1.0 database files and copies these into the new Release 2.0 database.

- 5 When the Upgrade utility is finished, reboot the database server.

To upgrade the Real-time Server

The Release 1.0 Real-time Server Package is now included in the Database Package. It is overwritten when you perform the procedure in “To upgrade the database” on page 152.

To upgrade the Customer Interface and the Administrator

To upgrade the Administrator and the Customer Interface, follow the instructions in “Installing Symposium WebResponse Administrator” on page 43 and “Installing the Customer Interface” on page 34.

The Symposium WebResponse Server Release 2.0 installation program recognizes whether an older version of the software is already installed, and then either upgrades or installs accordingly.

To upgrade the Agent Interface

In Release 1.0, the Agent Interface was installed directly on the agent PCs. In Symposium WebResponse Server Release 2.0, you install the Agent Interface on a server. The Agent Interface is essentially a web site that allows the agents to log on using a web browser and work on the transactions.

You should uninstall the original Agent Interfaces from the local clients to avoid confusion. If you do not uninstall the local Agent Interfaces, agents may try to access Symposium WebResponse Server Release 2.0 using the Release 1.0 interface.

Telephony Client

This is a new feature for Symposium WebResponse Server Release 2.0. There is no upgrade for this feature.

Telephony Service

This is a new feature for Symposium WebResponse Server Release 2.0. There is no upgrade for this feature.

Uninstalling the software

When to use

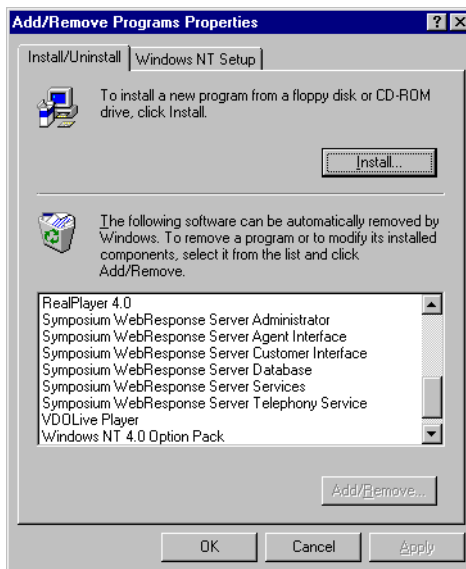
Follow the instructions in this section to uninstall the Symposium WebResponse Server Release 2.0 software.

Order to uninstall software

You should uninstall the Database component last. You can remove the other Symposium WebResponse Server components in any order.

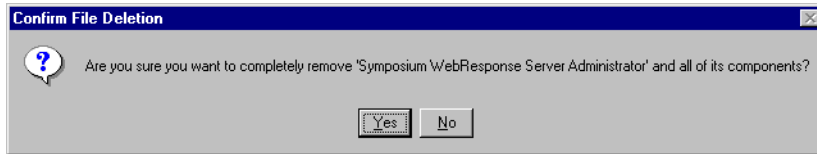
To uninstall the software

- 1 From the Windows Start menu, choose Settings → Control Panel.
- 2 Double-click Add/Remove Programs.



- 3 Select a Symposium WebResponse Server application, and then click Add/Remove.

Result: A message asks you to confirm whether you want to remove the application.



- 4 Click Yes to confirm the deletion.

Result: The application files are deleted from your computer.

- 5 Repeat steps 3 and 4 for each of the Symposium WebResponse Server applications.

To complete the uninstall

To complete the Symposium WebResponse Server uninstall, you should remove Sybase Adaptive Server. Refer to the Sybase documentation for instructions.

Chapter 9

Troubleshooting

In this chapter

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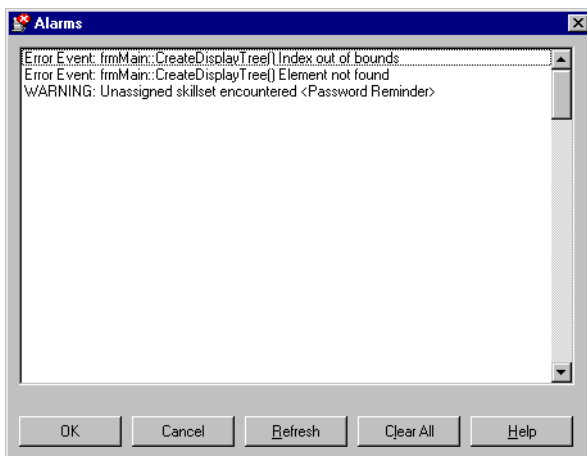
Alarms and error messages

Viewing the error log

Symposium WebResponse Server records system errors and alarms to help you troubleshoot problems.

To view the error log

Choose View → View Alarms from the Symposium WebResponse Server Administration window.



Note: When the View Alarms menu item is disabled, the error log is empty.

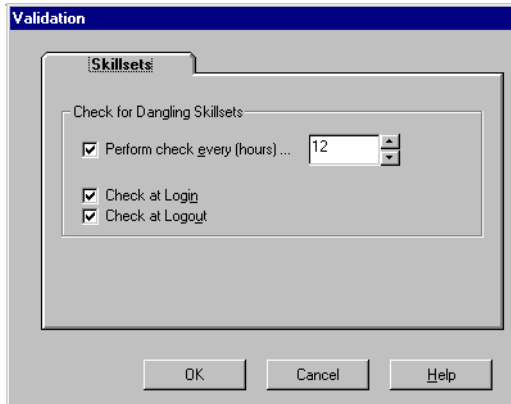
To check for unassigned skillsets

- 1 Choose View → View Alarms from the Symposium WebResponse Server Administration window.
- 2 In the Alarms window, look for errors relating to skillsets.

Note: If no alarms or errors exist, the View Errors menu item appears gray.

To set skillset validation at logon and logoff

- 1 Choose Utilities → Options from the Symposium WebResponse Server Administration window.



- 2 To check for unassigned skillsets when administrators and supervisors are logging on, ensure that Check at Login is checked.
- 3 To check for unassigned skillsets when administrators and supervisors are logging off, ensure that Check at Logoff is checked.

To check for error messages

- 1 If the status bar is not displayed, choose View → Statusbar.
- 2 Look at the status bar at the bottom of the Symposium WebResponse Administration window. The number of alarm messages appears in the middle of the status bar.

Tip: You can double-click the number of messages on the status bar to view details.

Interpreting error messages

The most frequent error is an unassigned skillset. This error means that no agents have been assigned to the skillset. Customer requests that are routed to unassigned skillsets cannot be handled by agents.

Dynamic Transaction Handler troubleshooting

When to use

If the Dynamic Transaction Handler (DTH) is not presenting transactions to agents, it may be because the DTH is not configured properly. The DTH depends on several other components to function properly. Follow the instructions in this section to ensure that these components are configured properly.

Check the Symposium WebResponse Server Administrative configuration

Ensure that the Administrative configuration for Symposium WebResponse Server is correct for the phone number and priority.

- The phone number for each skillset must be a valid phone number and it must be where you can hear it ring (for testing). It must be associated with an agent for proper functionality.
- A priority must be entered for each skillset. If there are any priorities missing, the DTH will not function correctly.

Check the database

Ensure that the database is active and contains valid Internet transactions.

- The status of any valid Internet transaction is set to the value 0.
- The call back date and time of the transaction must be greater than or equal to ($\geq$) the current system date and time minus (-) one (1) hour.

To ensure that TAPI is functioning properly

- 1 Start the TAPI browser (TB20W.exe)
- 2 Initialize the lines.
- 3 Open all of the lines.
- 4 Make a phone call through one of the lines using the TAPI Browser.
- 5 Disconnect the call.

- 6 Make another call through the same line using TAPI Browser.
If the second call is completed correctly, then TAPI is functioning properly.

Ensure that the TN in question is configured properly

- 1 Check that AST is set properly in the switch. This is the ACD key number and the primary DN key number for the phone set that TAPI will be watching.
- 2 Check that IAPG is set to 1 in the switch.
- 3 Check that VASID is set to the same value as VASID in the MLink.

Test TAPI again

Once you have confirmed the above conditions, follow these steps.

- 1 Shut down the TAPI Server, and then restart it.
- 2 Repeat all of the steps in “To ensure that TAPI is functioning properly” on page 160.

When you can make four consecutive successful calls using the same line in the TAPI browsers, TAPI is configured properly.

Check the database

- 1 Use a tool such as MS Query or SQL Advantage to look at the database tables.
 - 2 Ensure the following:
 - a. Check the skillset columns Skillset_ID, ACD_DN, and Priority to ensure that each skillset has an ACD_DN and priority configured.
 - The priority is a small integer field (for example, 0–25).
 - The ACD_DN must be a valid phone number.
- The DTH calls this number on a skillset match.

- b.** Look at the table trans columns trans_id, trans_status, trans_callback_date.

The DTH looks at transactions with trans_status=0 and trans_callback_date >= the current time/date. If it finds a match, the status changes from 0 to 5. If this change takes place, the DTH is working correctly. It is attempting to place calls, but TAPI is not allowing the calls to go through. This is not a problem with DTH or Symposium WebResponse Server. Coordinate with your TAPI and switch administrators to get TAPI working correctly.

Database connection errors

When to use

Follow the instructions in this section if you receive database connection errors. One possible error message that you may receive if the Data Miner cannot communicate with the Sybase database is

The description for event ID (3) in Source (Miner) could not be found. It contains the following insertion string(s): Source = Microsoft OLE DB Provider for ODBC Drivers.

Possible solutions

- Use the Sybase DSEdit program to edit the Sybase Interfaces configuration file. For each database server defined in the configuration file, the Server Address entry must be set up with the appropriate IP address and port of the Sybase server.

Example

For the main Sybase database server name, the NLWNSCK driver, the configuration could be

xxx.xxx.xxx.xxx,5000

where

xxx.xxx.xxx.xxx is the IP address of the Sybase database server, and 5000 is the port number.

sss server - NLWNSCK xxx.xxx.xxx.xxx,5000

sss_BS (backup) server - NLWNSCK xxx.xxx.xxx.xxx,5001

sss_MS (monitor) server - NLWNSCK xxx.xxx.xxx.xxx,5002

sss_HS (history) server - NLWNSCK xxx.xxx.xxx.xxx,5003

sss_XP server - NLWNSCK xxx.xxx.xxx.xxx,5004

where sss is the name of the SWRS Sybase database server name.

- Another possible solution is to ensure that the Sybase database server (NT services program) started. Follow the procedure in “To set the services to start automatically” on page 30.

- Another possible solution is to ensure that the ODBC Datasource - SWRS2DB - exists and is pointing to the correct Sybase database server name and the appropriate database name.

Appendix A

Database field names

In this appendix

List of database field names

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List of database field names

Overview

This appendix contains a list of database field names, their data types, and the field length.

Customer_session

Field Name	Data Type	Length
Session_id	Numeric	4
Cust_id	Numeric	6
Login_time	Datetime	8
Logout_time	Datetime	8
Timeout	Bit	1
last_access_time	Datetime	8

Customer

Field Name	Data Type	Length
Cust_id	Numeric	12
Cust_username	Varchar	50
Cust_password	Varchar	50
Cust_firstname	Varchar	50
Cust_surname	Varchar	255
Cust_address1	Varchar	255
Cust_address2	Varchar	255
Cust_address3	Varchar	255
Cust_address4	Varchar	255
Cust_address5	Varchar	255
Cust_postal_zip_code	Varchar	50
Cust_email	Varchar	255
Cust_phone_intl	Varchar	50
Cust_phone_area	Varchar	50
Cust_phone_number	Varchar	50
Cust_fax_intl	Varchar	50
Cust_fax_area	Varchar	50
Cust_fax_number	Varchar	50
Cust_internet_phone_id	Varchar	50
Cust_internal_reference	Varchar	20
Cust_register_date	Datetime	8

Cust_login_page	Numeric	12
-----------------	---------	----

Transaction

Field Name	Data Type	Length
Trans_id	Numeric	12
Trans_cust_id	Numeric	12
Trans_open_time	Datetime	8
Trans_arrival_time	Datetime	8
Trans_status	Tinyint	3
Trans_agent_id	Numeric	12
Trans_skillset_id	Numeric	12
Trans_source	Tinyint	3
Trans_objective	Text	2147483647
Prev_contact	Varchar	50
Contract_no	Varchar	50
Alt_contact	Varchar	50
Internet_phone_id	Varchar	50
Trans_phone_intl	Varchar	50
Trans_fax_intl	Varchar	50
Trans_callback_date	Datetime	8
Trans_pref_callback_media	Tinyint	3
Trans_open_duration	Numeric	18
Trans_timezone	Smallint	5
Trans_sub_status	Smallint	5
Trans_act_code	Char	1

Response

Field Name	Data Type	Length
Resp_id	Numeric	12
Trans_id	Numeric	12
Response_date	Datetime	8
Callback_status	Tinyint	3
Agent_id	Numeric	12
Response_text	Text	2147483647
Response_attempt_no	Tinyint	3
Attachment_location	Varchar	255
Template_location	Varchar	255
Time_allocated	Numeric	6
Agent_comment	Varchar	255
Response_method	Tinyint	3
Number_used	Varchar	255
Callback_media	Tinyint	3
Email_subject	Varchar	255
Response_source	Tinyint	3

Appendix B

Customizing Symposium WebResponse Server

In this chapter

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Introduction

Two web form templates are automatically installed with the Customer Interface component of Symposium WebResponse Server. You can customize these templates to create web pages and forms that meet the specific needs of your call center.

You can design web pages using any text or HTML editor, such as MS Front Page. Then, add keywords to the HTML so that values are taken from the database. You may then need to make simple modifications to the scripts to suit your pages.

You can also use scripts within the HTML pages, such as JavaScript and others.

Note: Older versions of browsers do not support this technology and most browsers can allow the web user to disable their use. All examples given do not use scripts within HTML.

The CGI scripts support the use of cookies. Cookies allow information to be stored on the web client and provide a faster method of maintaining a user's state information. If the web user's browser does not support cookies, or if they are disabled, then the scripts use an alternate method of passing state information.

Skills you need

This guide only gives basic information about customizing the web templates that come with the Symposium WebResponse Server. You must already be familiar with web page development, Perl scripting, and HTML or Java programming to use the instructions in this section effectively.

Types of web users

There are CGI scripts for the following types of web users:

- **Registered Web User, or customers:** These scripts allow a web user to register as a customer on the Symposium WebResponse Server system. The customer can then log on, submit requests, and look at all of his or her transactions and responses.

- **Unregistered Web User:** These scripts allow a web user to submit requests to the Symposium WebResponse Server system.

Configuration

The CGI scripts access the database to insert and retrieve data. Therefore, they need information about how to log on to the database. As files in the web server directories are accessed from the web server, the configuration file with this information must be stored outside the web server directories. Therefore, there must be a file in the CGI directory to point to the location of the configuration file. This file is called ConfigFile.pl and has the following format:

```
$configfilename = "C:\\winnt\\SWRSFlowerShop.ini";1;
```

Note: The double slashes and the "1;" are required.

The configuration file should contain the following:

```
[directories]
```

```
templates=c:\\inetpub\\swrs-cgi\\FlowerShop\\templates\\
```

```
[SQL]
```

```
DataSourceServer=SWRS_SQLSRV
```

```
DataSourceName=SWRS_DB
```

```
UserID=insert
```

```
UserPWD=insertpwd
```

```
[options]
```

```
Language=1
```

```
where
```

- Directories/templates gives the location of the template files.
- SQL gives logon parameters for the database.
- Options/language specifies what language is used for the values of status fields.

For the two sample web forms that come with Symposium WebResponse Server, the ConfigFile.pl is generated at install, and the configuration files, SWRSFlowerShop.ini and SWRSplain.ini, are installed in the Winnt directory.

Rules

Transactions

You can add additional fields to each transaction. Specify input fields on a web form. Do not begin the names of these input fields with “trans_”.

Customers

The cust_username field is set to a unique numeric value using the unregistered web user scenario described earlier. The value used in the sample scripts is the number of seconds since 1/1/1970 GMT. In the registered web user scenario, the cust_username field cannot be numeric. This feature facilitates functions in the agent interface.

Templates

You can build customized web pages to meet the requirements of your call center. By inserting particular keywords, you can create templates from the static web pages. These templates can be used with the Symposium WebResponse Server CGI code.

Database fields

Database fields can be displayed and updated on the web. For a full list of available database fields, see Appendix A, “Database field names.”

Web forms

To take information from a web form to either update an existing record or to insert a new record, you need to modify the input field in the HTML source code to change the name of the input field to be the same name as the database field.

For example:

```
<INPUT TYPE="text" SIZE=20 MAXLENGTH=50 NAME="firstname">
```

changes to

```
<INPUT TYPE="text" SIZE=20 MAXLENGTH=50  
NAME="cust_firstname">
```

where cust_firstname is a database field name in the customer table.

You can also use SELECT tags. For example:

```
<SELECT name="location">
```

```
<OPTION selected value="Ireland">Ireland</OPTION>
```

```
<OPTION value="England">England</OPTION>
```

```
<OPTION value="Scotland">Scotland</OPTION>
```

```
<OPTION value="Wales">Wales</OPTION>
```

```
</SELECT>
```

changes to

```
<SELECT name="trans_skillset_id">
```

```
<OPTION selected value="10">Ireland</OPTION>
```

```
<OPTION value="11">England</OPTION>
```

```
<OPTION value="12">Scotland</OPTION>
```

```
<OPTION value="13">Wales</OPTION>
```

```
</SELECT>
```

where trans_skillset_id is a database field name in the trans table.

You can also use TEXTAREA tags. For example:

```
<TEXTAREA ROWS="5" COLS="50" name="customer_query"></TEXTAREA>
```

changes to

```
<TEXTAREA ROWS="5" COLS="50" name="trans_objective"></TEXTAREA>
```

where trans_objective is a database field name in the trans table.

Web pages

To display information on a web page from a database record, you need to type the name of the database field followed by the text “_value”.

For example:

```
<FONT SIZE=+2>Order History for Joe Bloggs</FONT>
```

changes to

```
<FONT SIZE=+2>Order History for cust_firstname_value  
cust_surname_value</FONT>
```

where cust_firstname is a database field name in the customer table,

and cust_surname is a database field name in the customer table.

Some database fields are represented by a numeric value. This is to facilitate customization and localization. However, displaying these numeric values on a web page is not very informative. There is a table in the database that maps these numeric values to their text explanation. To display the text explanation on the web page, you need to add the suffix “_text_value” to the field name.

For example:

Preferred Response Method: Telephone

changes to

Preferred Response Method: trans_pref_callback_media_text_value

where pref_callback_media is a database field name in the transaction table,

and there are entries in the code mapping table for the possible values of pref_callback_media.

The following fields map from a numeric value to a text value and can be displayed on a web page as described above:

- Trans_pref_callback_media in the transaction table
- Trans_status in the transaction table
- Trans_source in the transaction table
- Response_method in the response table
- Callback_status in the response table
- Cust_login_page in the customer table

Note: When a record containing these fields is retrieved from the database, the text values for these fields are also retrieved.

The `skillset_id` field in the transaction table is a numeric field; this does not have a hard-coded mapping in the `code_mapping` table. However, it is mapped to a text value in the `skillset` table. The text value is always retrieved when a transaction record is retrieved. Therefore, to display the text value of the skillset ID, use the following:

Skillset: skillset_name_value

The `agent_id` field in the Response table is treated similarly. It is mapped to two text values in the `user_details` table: `user_firstname` and `user_surname`. These are combined to give a text value called `agent_name`. Therefore, to display the text value of `agent_id`, use the following:

Agent Name: agent_name_value

Pre-filled web forms

On some web forms (for example, Customer Account Details), you may want to display the values that are already in the database, as well as allowing the customer to update these fields. To do this, you need to specify the database field name as the “name” part of the INPUT tag and specify the database field name suffixed with “_value” as the value part of the INPUT tag.

For example:

```
<INPUT TYPE="text" SIZE=20 MAXLENGTH=50 NAME="firstname"
VALUE="Joe">
```

changes to

```
<INPUT TYPE="text" SIZE=20 MAXLENGTH=50 NAME="cust_firstname"
VALUE="cust_firstname_value">
```

You can also use SELECT statements on the web form. To show what the current database value is, you need to specify it before the SELECT statement. Leave an option on the SELECT statement to allow for no change. By default, the first option is selected.

For example:

```
<TR><TD ALIGN=RIGHT>Default Log On Page</TD>
```

```
<TD ALIGN=CENTER>cust_login_page_text_value </TD></TR>
```

```
<TR><TD ALIGN=RIGHT> Change Default Log On Page</TD>
<TD ALIGN=CENTER>
<SELECT name="cust_login_page">
<OPTION value=0>(No change)</OPTION>
<OPTION value=1>Submit a Request</OPTION>
<OPTION value=2>View Transaction History</OPTION>
<OPTION value=3>Update Account Details</OPTION>
</SELECT>
</TD></TR>
```

Note: Use JavaScript, or something similar, to force the current value to be selected. For more detail, see Appendix D, “JavaScript example.”

Repeating lines

In some cases, the web page needs to display a number of records from a table. For example, Transaction History displays all of the Transactions for a customer. There could be any number of transactions, so you must define how to state that lines are repeated.

For transaction records, enclose the repeating lines (only specify HTML for one line) in the tags <SWRSTransaction> and </SWRSTransaction>. These tags must be on lines with no other HTML code. For example:

```
<CENTER><FONT SIZE=+2>Order History for Joe Bloggs</FONT>
<TABLE BORDER=1>
<TR><B>
<TD>Order Number</TD>
<TD>Recipient</TD>
<TD>Address</TD>
```

<TD>Delivery Date</TD>

<TD>Delivery Location</TD>

</TR>

<TR>

<TD>1234</TD>

<TD>Jane Bloggs</TD>

<TD>22 Somewhere Street, Big city, Scotland</TD>

<TD>January 1st 1999</TD>

<TD>Scotland</TD>

</TR>

<TR>

<TD>1235</TD>

<TD>Jennifer Bloggs</TD>

<TD>25 SomewhereElse Street, Small Town, Wales</TD>

<TD>January 1st 1999</TD>

<TD>Wales</TD>

</TR>

</TABLE>

changes to

<CENTER>Order History for Joe Bloggs

<TABLE BORDER=1>

<TR>

```
<TD>Order Number</TD>
<TD>Recipient</TD>
<TD>Address</TD>
<TD>Delivery Date</TD>
<TD>Delivery Location</TD>
</B></TR>
<SWRSTransaction>
<TR>
<TD>transaction_no_value</TD>
<TD>Delivery_Name_value</TD>
<TD>Delivery_Address_value</TD>
<TD>Delivery_Date_value</TD>
<TD>skillset_name_value</TD>
</TR>
</SWRSTransaction>
</TABLE>
```

For response records, enclose the repeating lines (only specify HTML for one line) in the tags <SWRSResponse> and </SWRSResponse>. These tags must be on lines with no other HTML code. For example:

```
<TABLE BORDER=1>
<TR><B>
<TD>Response Number</TD>
<TD>Agent</TD>
```

```
<TD>Response Date</TD>
<TD>Message</TD>
</B></TR>
<TR>
<TD>789</TD>
<TD>Jack Agent</TD>
<TD>December 10th 1998</TD>
<TD>Telephoned to get Credit card details; nobody home.</TD>
</TR>
<TR>
<TD>794</TD>
<TD>Jack Agent</TD>
<TD>December 11th 1998</TD>
<TD>Got Credit card details by e-mail; order confirmed.</TD>
</TR>
</TABLE>
changes to
<TABLE BORDER=1>
<TR><B>
<TD>Response Number</TD>
<TD>Agent</TD>
<TD>Response Date</TD>
```

```

<TD>Message</TD>

</B></TR>

<SWRSResponse>

<TR>

<TD>response_number_value</TD>

<TD>agent_id_value</TD>

<TD>response_date_value</TD>

<TD>response_text_value</TD>

</TR>

</SWRSResponse>

</TABLE>

```

Additional fields on the transaction record

You may need to include additional fields on the transaction record to store data particular to the application. To customize a web form to accept these fields, use a normal HTML input statement such as

```
<INPUT TYPE="text" SIZE=20 MAXLENGTH=50 NAME="Delivery
Name">
```

You may also use SELECT or TEXTAREA input tags.

To display the value of these fields, append `_value` to the name of the field and replace any spaces with an underscore. To display the value of Greeting card, use the following:

```
Delivery Name: <EM>Delivery_Name_value</EM><BR>
```

Note: Do not start any additional fields with “trans_”.

Error

If an error occurs at any stage during customer navigation, an error page is displayed and the relevant error message is passed to the CGI program that displays the error page. The error page is a template, which contains the keyword `SWRSError` to say where the error message will be displayed.

For example:

```
<H2><CENTER>Your submission failed for the following reason:</
CENTER></H2>
```

```
<P><B><CENTER><I>SWRSError</I></CENTER></B>
```

Note: The error template cannot contain all of the other normal features of a template. This is because an error can occur at customer login, which may result in the customer details not being correctly retrieved.

Non-database fields

Confirm password

On the Registration page, the web user must enter a password and confirm it. The confirmed password input field is used for comparison only; it is not inserted into the customer record. The name used for the confirmed password is `conf_cust_password`.

For example:

```
<TR><TD ALIGN=RIGHT>* Password</TD>
```

```
<TD><INPUT TYPE=PASSWORD SIZE=20 MAXLENGTH=50
NAME="cust_password"></TD>
```

```
<TD ALIGN=RIGHT>* Confirm Password</TD>
```

```
<TD><INPUT TYPE=PASSWORD SIZE=20 MAXLENGTH=50
NAME="conf_cust_password"></TD></TR>
```

This also applies to the Update Account page.

Date fields

On the Request page, the web user can enter a call back time and date by selecting hour, minutes, day, month, and year. The values selected are inserted into the database in the correct time and date format as trans_callback_time. The temporary fields used to take the date and time values are callback_time_hour, callback_time_minute, callback_date_day, callback_date_month, callback_date_year.

For example:

```
<SELECT NAME="callback_date_month">  
<OPTION SELECTED VALUE=1>January</OPTION>  
<OPTION VALUE=2>February</OPTION>  
<OPTION VALUE=3>March</OPTION>  
<OPTION VALUE=4>April</OPTION>  
<OPTION VALUE=5>May</OPTION>  
<OPTION VALUE=6>June</OPTION>  
<OPTION VALUE=7>July</OPTION>  
<OPTION VALUE=8>August</OPTION>  
<OPTION VALUE=9>September</OPTION>  
<OPTION VALUE=10>October</OPTION>  
<OPTION VALUE=11>November</OPTION>  
<OPTION VALUE=12>December</OPTION>  
</SELECT>
```

Dynamic links

As the customer navigates to different pages, information passes to the process that displays the next web page or form. This information includes information such as the session ID, customer ID, transaction ID and response ID. The CGI programs use this information to retrieve the correct data from the database to be displayed on the next web page.

Anchor links

Anchor links look like this:

```
<A HREF="TransHist.html">View Transaction History</A>
```

For most customer navigation, the link calls a CGI program instead of linking directly to another HTML page:

```
<A HREF="/swrs-cgi/LinkTransHist.pl">View Transaction History</A>
```

For a complete list of CGI programs, see “CGI Scripts” on page 190.

To pass state information to the program called by this link, include the keyword `SWRSessionLink` as a parameter to the CGI program. To specify a parameter to a CGI program, include a question mark between the program name and the parameter list, as in the following example:

```
<A HREF="/swrs-cgi/LinkTransHist.pl?SWRSessionLink">View Transaction History</A>
```

When the template containing this line is written to the browser, the keyword `SWRSessionLink` is replaced with a relevant list of parameters.

Note that these anchor links cannot be applied to Registration, Log In, and Once off Request pages.

Web forms

When the customer submits a web form, the state information also must be passed to the CGI program. To do this, you must include hidden fields on the form. Include the keyword `SWRSessionForm` between the start and end form tags:

For example:

```
<FORM METHOD="POST" ACTION=""/swrs-cgi/insertTrans.pl">
```

...

```
</FORM>
```

changes to

```
<FORM METHOD="POST" ACTION=""/swrs-cgi/insertTrans.pl">
```

```
SWRSessionForm
```

...

```
</FORM>
```

This applies to Update Account, New Request, and Respond to Transaction pages.

Next and previous links

Some web pages require Next and Previous links. For example, View Transaction displays one transaction of many for a customer. The customer should be able to link to the next and previous transactions in the list. To do this, add the SWRSNext and SWRSPrev keywords to the list of parameters given on the link.

For example:

```
<A HREF="/swrs-cgi/LinkTransOnRow.pl?SWRSessionLink">Previous</A>
```

changes to

```
<A HREF="/swrs-cgi/LinkTransOnRow.pl?SWRSessionLink&SWRSPrev">Previous</A>
```

or

```
<A HREF="/swrs-cgi/LinkTransOnRow.pl?SWRSessionLink&SWRSNext">Next</A>
```

Note: Use the ampersand character (&) to separate the parameters. This applies to Transaction Details and Response Details pages.

CGI Scripts

Overview

Use CGI scripts to give or take the information on the web, validate, and update the database if necessary.

About Perl

The CGI scripts in Symposium WebResponse Server are written in Perl. Perl is an interpreted language optimized for scanning arbitrary text files, extracting information from those text files, and printing reports based on that information. It is also widely used for developing web applications mainly due to the availability of very good World Wide Web support modules. Database support modules are also available to interact with different databases.

Where to find more information

Perl is a scripting language; that is, the source code is interpreted at run time. Therefore, all of the source code for the web component is provided and can be modified to suit the particular application of Symposium WebResponse Server. The Perl interpreter is included with the Symposium WebResponse Server installation, although the latest version can be downloaded free from <http://www.perl.com>. There is a great deal of information available on the web about Perl, but this is a good place to start.

Perl supports object-orientated programming. An object is represented as a package, and these packages are generally stored as Perl modules in the Perl library directory. The web component of Symposium WebResponse Server includes packages to interact with the database and maintain session information.

Third-party packages

The following third-party packages are used in Symposium WebResponse Server:

- **Sybperl** Sybase extensions to Perl. For more information, see <http://www.mbay.net/~mpeppler/Sybperl/sybperl.html>.
- **CGI.pm** Objects to create Web fill-out forms on the fly and to parse their contents. For more information, see <http://www.mbay.net/~mpeppler/Sybperl/sybperl.html>.

These packages are freely distributed and are included with the Symposium WebResponse Server installation.

Packages used in CGI scripts

The installation also includes packages specifically designed for the web component of Symposium WebResponse Server. The following list outlines the packages that are used in the CGI scripts:

- **Session** Maintains session information.
- **Customer** Maintains customer information.
- **Transaction** Maintains transaction information.
- **Response** Maintains response information.
- **Reply** Displays web pages with appropriate information about the customer, transaction, and response.
- **Result** Holds results of database query.
- **ResultNode** Holds the results of database query.
- **Config** Takes configuration data from the configuration file.
- **DBLink** Interface to Sybperl and database.

Although the source code for these packages is provided, it is not recommended that they be modified as this can affect upgrades.

Modules

The CGI scripts call methods in these modules to query and update the database and to maintain state information. The following sections give a brief description of some of the package methods used in the scripts. See Appendix C, “Module reference,” for a complete reference.

Package	Method	Purpose
Session	new	Creates a new session with a session ID, if available. Sets up database and configuration information.
	login	Logs the customer session on the database.
	logAccess	Logs the customer’s last access.
	logOut	Logs customer session complete.
	CheckTimeout	Sets the time-out flag if customer session has timed out.
	Relogin	Logs the customer in again.
	GetCustID	Returns the customer ID of the current session.
	getTransaction	Returns the current instance of Transaction.
	getCustomer	Returns the current instance of Customer.
	getResponse	Returns the current instance of Response.
Customer	new	Creates a new empty instance of Customer.
	getCustomerID	Gets the customer ID of the current customer.
	getCustomerWhere	Retrieves the customer where conditions match the input parameter.
	getCustomerWithUsername	Retrieves the customer where the username matches the input parameter.

	getCustomerWithUsernameAndPassword	Retrieves the customer where the username and password match the input parameters.
	getCustomerWithID	Retrieves the customer where the customer ID matches the input parameter.
	getCustomerUsernameWithID	Retrieves the customer ID where the customer ID matches the input parameter.
	CheckCustomerBar	Sets the customerBar flag if the customer is barred.
	InsertCustomer	Inserts the customer record.
	UpdateCustomer	Updates the customer record.
Transaction	New	Creates a new empty instance of a transaction.
	GetTransactionID	Gets the transaction ID of the current transaction.
	GetTransWithCustomerID	Retrieves the transaction records where the customer_id matches the input parameter.
	GetTransWithCustomerIDAndArrivalTime	Retrieves the transaction records where the customer_id and arrival_time match the input parameters.
	GetTransWithID	Retrieves the transaction records where the transaction ID matches the input parameter.
	InsertTrans	Inserts the transaction record.
Response	New	Creates a new empty instance of Response.
	GetResponseID	Gets the response ID of the current response.
	GetResponseWithTransactionID	Retrieves responses where the transaction ID matches the input parameter.
	GetResponseWithTransactionIDAndResponseDate	Retrieves responses where the transaction ID and response_date match the input parameters.

	GetResponseWithID	Retrieves the response where the response ID matches the input parameter.
	InsertResponse	Inserts the response record.
Reply	New	Creates a new instance of Reply.
	PrintHTMLReply	Prints an HTML page based on a template populating the page with database values based on the keywords described earlier.
	PrintHTMLError	Prints an HTML page based on a template populating the page with customer database values based on the keywords described earlier.

Scripts

The following table gives a brief description of each script.

Script Name		Purpose
Login.pl	InsertTrans.html TransHist.html UpdateCustomer.html	Called when the login form is submitted. Validates the customer username and password. If these are invalid, displays an error page. Otherwise, logs the customer in and displays the customer's default login page.

Register.pl	RegisterConfirm.html	Called when the Customer Registration form is submitted. Validates the customer details and inserts the customer record. Logs the customer in and displays the confirmation page.
Logout.pl		Logs the customer out.
LinkUpdateCustomer.pl	UpdateCustomer.html	Called from the toolbar anchor link. Links to the Update Customer Details form, populating values on the form where required.
LinkInsertTrans.pl	InsertTrans.html	Called from the toolbar anchor link. Links to the New Transaction form.
LinkTransHist.pl	TransHist.html	Called from the toolbar anchor link. Links to the Transaction History page.
LinkTransOnRow.pl	Trans.html	Called from an anchor link on one transaction. Displays the details for that transaction, including responses associated with that transaction.

LinkResponseOnRow.pl	Response.html	Called from an anchor link on one response. Displays the details for that response.
LinkInsertResponse.pl	TransResponse.html	Called from a toolbar anchor link. Links to Transaction Response, a form that allows the customer to respond to the transaction.
InsertTrans.pl	InsertTransConfirm.html	Called when New Transaction form is submitted. Validates the details and inserts the new transaction into the database.
UpdateCustomer.pl	UpdateCustomerConfirm.html	Called when an Update Customer Details form is submitted. Validates the details and updates the customer record.
InsertResponse.pl	TransResponseConfirm.html	Called when a Transaction Response form is submitted. Validates the details and inserts the new response record. Note: This script also reopens the transaction to bring it to the agent's attention.

InsertTransAndCustomer.pl	TransAndCustConfirm.pl	Called when the web user does not register as a customer. This form requires both customer and transaction details. The script validates these details and inserts a new customer and transaction record.
ForgotPassword.pl	ConfirmPassword.html	Called when a customer forgets his or her username or password. The form requires some customer details. The script tries to retrieve the customer record based on what the customer entered. If successful, it displays the password; otherwise, it inserts a transaction so that an agent can reply to the customer with his or her password.

Script examples

This section describes three of the scripts in detail to show how the modules are used.

Login.pl

- Imports all of the required modules.
- Creates a new instance of the CGI object. This is automatically populated with the values from the login form (that is, the username and password name value pairs).
- Creates a new instance of Session, passing in the name of the configuration file and reference to CGI instance as parameters.

- Creates a new instance of Reply, passing in the reference to the Session instance as a parameter.
- Calls a local function, webValidate, to validate the username and password. This function checks that the values were entered.
- Creates a new instance of Customer, passing in a reference to the Session instance as a parameter.
- Gets the value of the username and password from the instance of the CGI object.
- The script uses these values to call a method on Customer instance to retrieve the database record with this user ID and password. This method populates the instance of Customer with the database values.
This method only returns the cust_id field of the database record.
- If the user ID and password are correct, there should be only one record retrieved from the database. The script checks that there is only one record retrieved.
- Retrieves the cust_id from the populated instance of Customer.
- Calls a method Session instance to log on the customer passing cust_id as a parameter.
- Calls a method on Customer to retrieve all of the details of the customer passing cust_id as a parameter.
- Sets a reference in the Session instance to the populated instance of Customer.
- Gets the cust_login_page value from the instance of Customer. Based on this value, it assigns the appropriate value to the variable templatefile.
- If the cust_login_page is equal to 2, Transaction History, then the transaction records for this customer need to be retrieved. The script creates a new instance of Transaction, calls a method on Transaction to retrieve all records for this customer passing cust_id as a parameter, and sets a reference in the session instance to the populated instance of Transaction.
- Prepends the directory where the template files are stored onto the variable template file. The directory is taken from the configuration file.
- Calls a method on the Reply instance to print the template to the browser, substituting the keywords with the appropriate database values.
- Exits.

LinkTransHist.pl

- Imports all of the required modules.
- Creates a new instance of the CGI object. This is automatically populated with the values passed from the URL (that is, the session_id and cust_id).
- Creates a new instance of Session, passing in the name of configuration file and reference to CGI instance as parameters.
- Creates a new instance of Reply, passing in a reference to Session instance as a parameter.
- Calls a method on the Session instance to retrieve the customer information, passing a reference to the CGI instance as a parameter. This returns a populated instance of Customer. Checks for errors.
- Gets cust_id from Customer instance.
- Creates a new instance of Transaction.
- Calls a method on Transaction instance to retrieve transactions for this customer, passing cust_id as a parameter.
- Checks for errors.
- Sets a reference in the Session instance to the populated instance of Transaction.
- Calls a method on Session instance to log on the database that the customer is still active.
- Prepends the directory where the template files are held onto the variable template file. The directory is taken from the configuration file, which was passed in with the URL.
- Calls a method on the Reply instance to print the template to the browser, substituting the keywords with the appropriate database values.
- Exits.

InsertTrans.pl

- Imports all of the required modules.
- Creates a new instance of CGI object. This is automatically populated with the values from the request form (that is, all of the name-value pairs).
- Creates a new instance of session, passing in name of configuration file and reference to CGI instance as parameters.

- Creates a new instance of Reply, passing in a reference to Session instance as a parameter.
- Calls a local function, webValidate, to validate the form fields.
This checks that the required values were entered, formats the date and time fields, and deletes the temporary and hidden fields.
- Calls a method on the Session instance to retrieve the customer information, passing a reference to the CGI instance as a parameter.
This returns a populated instance of Customer.
- Checks for errors.
- Calls a method on Customer to check if the customer is barred. If the customerBar flag is set, then trans_status is set to 9, Barred. Otherwise, trans_status is set to 0, New.
- Sets trans_source to 5, Web.
- Gets the current time and adds a name-value pair to the CGI instance with name arrival_time and value equal to the current time.
- Gets the cust_id from the populated Customer instance. Adds a name-value pair to the CGI instance with name cust_id and the value of customer ID.
- Creates a new instance of Transaction, passing a reference to the CGI instance as a parameter.
- Calls a method on Transaction to insert a record in the trans table, passing a reference to the CGI instance as a parameter. This method uses the name value pairs in the CGI instance to format an insert statement. Checks for errors.
- Calls a method on the Transaction instance to retrieve the inserted transaction record, passing cust_id and arrival_time as parameters. Checks for errors.
- Sets a reference in the Session instance to the populated instance of Transaction.
- Calls a method on Session instance to log on the database that the customer is still active.
- Prepends the directory where the template files are held onto the variable template file. The directory is taken from the configuration file, which was passed in with the URL.

- Calls a method on the Reply instance to print the template to the browser, substituting the keywords with the appropriate database values.
- Exits.

Appendix C

Module reference

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Module reference	204
------------------	-----

Module reference

Session

New

Parameters	name of configuration file, reference to instance of CGI object
Returns	instance of Session object
Purpose	Creates a new instance of Session object; sets session_id to be the value of the session cookie or the value of the session form field. Sets up Config and DBLink instances to be used later. It also checks if the customer is timed out and redirects the customer to the relogin page.

login

Parameters	cust_id of customer logging on
Returns	current instance of Session object
Purpose	Inserts a record into customer_session table; then retrieves the record to get session_id.

logAccess

Parameters	None
Returns	current instance of Session object
Purpose	Updates last_access_time to be current time in customer_session table based on cust_id.

logout

Parameters	None
Returns	current instance of Session object

Purpose Updates logout time to be current time in customer_session table based on cust_id.

checkTimeout

Parameters None

Returns current instance of Session object

Purpose Retrieves time-out flag from customer_session record.

relogin

Parameters None

Returns current instance of Session object

Purpose Updates customer_session record to relogin the customer

getCustID

Parameters None

Returns current instance of Session object

Purpose Retrieves cust_id of current customer_session record.

setTransactionRef

Parameters reference to an instance of Transaction

Returns current instance of Session object

Purpose Sets the property, transaction, equal to the instance of transaction referred to by the parameter.

setCustomerRef

Parameters reference to an instance of Customer

Returns current instance of Session object

Purpose Sets the property, customer, equal to the instance of customer referred to by the parameter.

setResponseRef

Parameters	reference to an instance of Response
Returns	current instance of Session object
Purpose	Sets the property, response, equal to the instance of response referred to by the parameter.

setTransaction

Parameters	trans_id of transaction record to be retrieved
Returns	current instance of Session object
Purpose	Creates an instance of transaction; retrieves the record with trans_id equal to value passed in as parameter; sets the property, transaction, equal to this instance of transaction.

setCustomer

Parameters	cust_id of customer record to be retrieved
Returns	current instance of Session object
Purpose	Creates an instance of customer; retrieves the record with cust_id equal to value passed in as parameter; sets the property, customer, equal to this instance of customer.

setResponse

Parameters	resp_id of response record to be retrieved
Returns	current instance of Session object
Purpose	Creates an instance of response; retrieves the record with resp_id equal to value passed in as parameter; sets the property, response, equal to this instance of transaction.

getTransaction

Parameters	reference to instance of CGI object
------------	-------------------------------------

Returns	instance of Transaction object
Purpose	Returns value of property, transaction, if defined. Otherwise, gets the value of the form field, transaction. Calls setTransaction to retrieve instance of transaction based on trans_id and sets the property, transaction, equal to this instance of transaction.

getCustomer

Parameters	reference to instance of CGI object
Returns	instance of Transaction object
Purpose	Returns value of property, customer, if defined. Otherwise, gets the value of the cookie called customer if defined; creates new instance of Customer and populates it with the value of the cookie. If the cookie is not set, it gets value of form field, customer. Calls setCustomer to retrieve instance of Customer based on cust_id and sets the property, customer, equal to this instance of customer.

getResponse

Parameters	reference to instance of CGI object
Returns	instance of Response object
Purpose	Returns value of property, response, if defined. Otherwise, gets the value of the form field, response. Calls setResponse to retrieve instance of Response based on resp_id and sets the property, response, equal to this instance of response.

setCookie

Parameters	name of cookie, value of cookie
Returns	cookie
Purpose	Sets the cookie with a name and a value.

getCookie

Parameters	name of cookie
------------	----------------

Returns cookie

Purpose Returns the cookie based on name.

toLinkString

Parameters none

Returns string

Purpose Returns the string containing session, customer, transaction, response information in a format suitable to add as a parameter to an HTML anchor link.

toFormString

Parameters none

Returns string

Purpose Returns the string containing session, customer, transaction, response information in a format suitable to add as hidden fields to an HTML form.

Customer

new

Parameters	reference to instance of Session object
Returns	instance of Customer object
Purpose	Creates a new instance of Customer object; stores reference to Session instance.

getCustomerID

Parameters	none
Returns	customer id of current customer
Purpose	Returns the customer id of the current customer.

getCustomerWhere

Parameters	reference to instance of CGI object
Returns	current instance of Customer object
Purpose	Formats values of CGI instance into a query statement. Queries the database customer table based on these values. Populates the current instance of Customer with results.

getCustomerWithUsername

Parameters	username of customer
Returns	current instance of Customer object
Purpose	Queries the database customer table based on username. Populates the current instance of Customer with results.

getCustomerWithUsernameAndPassword

Parameters	username of customer, password of customer
Returns	current instance of Customer object

Purpose Queries the database customer table based on username and password. Populates the current instance of Customer with results.

getCustomerWithID

Parameters customer_id of customer

Returns current instance of Customer object

Purpose Queries the database customer table based on cust_id. Populates the current instance of Customer with results.

getCustomerUsernameWithID

Parameters customer_id of customer

Returns current instance of Customer object

Purpose Queries the database customer table based on cust_id. Populates the cust_username value of the current instance of Customer with results.

checkCustomerBar

Parameters none

Returns current instance of Customer object

Purpose Queries the database call_barring table based on cust_id. Sets the customerBar flag if a customer is barred.

insertCustomer

Parameters reference to instance of CGI object

Returns current instance of Customer object

Purpose Formats the values of CGI instance into an INSERT statement and applies it to the database.

updateCustomer

Parameters	reference to instance of CGI object
Returns	current instance of Customer object
Purpose	Formats the values of CGI instance into an UPDATE statement and applies it to the database.

Transaction

New

Parameters	reference to instance of Session object
Returns	instance of Transaction object
Purpose	Creates a new instance of Transaction object; stores a reference to Session instance.

getTransactionId

Parameters	none
Returns	trans_id of current transaction
Purpose	Returns trans_id of the current transaction.

getTransWithCustomerID

Parameters	customer id
Returns	current instance of Transaction object
Purpose	Queries the database trans table based on cust_id. Populates the current instance of Transaction with results.

getTransWithCustomerIDAndArrivalTime

Parameters	customer id, arrival time
Returns	current instance of Transaction object
Purpose	Queries the database trans table based on cust_id and arrival_time. Populates the current instance of Transaction with results.

getTransWithID

Parameters	transaction id
Returns	current instance of Transaction object

Purpose Queries the database trans table based on trans_id. Populates the current instance of Transaction with results.

insertTrans

Parameters reference to instance of CGI object

Returns current instance of Transaction object

Purpose Formats the values of CGI instance into an INSERT statement and applies it to the database.

updateTrans

Parameters reference to instance of CGI object

Returns current instance of Transaction object

Purpose Formats the values of CGI instance into an UPDATE statement and applies it to the database.

Response

new

Parameters	reference to instance of Session object
Returns	instance of Response object
Purpose	Creates a new instance of Response object; stores a reference to Session instance.

getResponseID

Parameters	none
Returns	response id of current the response
Purpose	Returns resp_id of current response.

getResponseWithTransactionID

Parameters	transaction id
Returns	current instance of Response object
Purpose	Queries the database response table based on trans_id. Populates the current instance of Response with results.

getResponseWithTransactionNoAndResponseDate

Parameters	transaction id, response date
Returns	current instance of Response object
Purpose	Queries the database based on trans_id and response_date. Populates the current instance of Response with results.

getResponseWithID

Parameters	response number
Returns	current instance of Response object

Purpose Queries the database response table based on response_id.
 Populates the current instance of Response with results.

insertResponse

Parameters reference to instance of CGI object

Returns current instance of Response object

Purpose Formats the values of CGI instance into an INSERT statement and applies it to the database.

Reply

new

Parameters reference to instance of Session object

Returns instance of Reply object

Purpose Creates a new instance of Reply object; stores a reference to Session instance.

printHTMLReply

Parameters name of template file

Returns nothing

Purpose Sets cookies for session, customer, transaction and response information. Scrolls through each line of the template file and replaces keywords with values from the database, printing each line.

printHTMLError

Parameters error message

Returns nothing

Purpose Prints the Error template file with error message.

Result

This class is inherited by Session, Customer, Transaction, and Reply. Therefore, all methods in this class can be called by any of those methods.

new

Parameters	none
Returns	instance of Result object
Purpose	Creates a new instance of Result object; this method is called by the new method in any class that inherits from this class.

clear

Parameters	none
Returns	current instance of Result object
Purpose	Clears all of the data in the current instance of Result object.

formatResultString

Parameters	string with database fields in the form row*name*value, row*name*value, ...
Returns	current instance of Result object
Purpose	Populates the current instance of Result object with values from the string passed in.

getValueWithRowAndName

Parameters	row to get, name to get
Returns	value of database field
Purpose	Returns the value of the database field in the row specied.

Appendix D

JavaScript example

In this appendix

JavaScript example

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JavaScript example

Overview

This section gives an example of JavaScript, which can be used in the HTML pages to customize the display.

Prefilled web form, forcing option to be preselected

This example shows how to force an option to be preselected on a web form, based on a value from the database.

```
<TR><TD ALIGN=RIGHT>Default Login Page</TD>

<TD ALIGN=CENTER>

<SELECT name="cust_login_page">

<script language="JavaScript">

<!--

var loginpage = cust_login_page_value;

for (var i = 1; i < 4; i++)

{

if (i == 1)

{

if (loginpage == 1)

document.write("<OPTION SELECTED VALUE=1>Submit a
Request</OPTION>");

else
```

```
        document.write("<OPTION VALUE=1>Submit a Request</  
        OPTION>");  
    }  
    if (i == 2)  
    {  
        if (loginpage == 2)  
        {  
            document.write("<OPTION SELECTED VALUE=2>View  
            Transaction History</OPTION>"); else  
  
            document.write("<OPTION VALUE=2>View Transaction  
            History</OPTION>");  
        }  
    }  
    if (i == 3)  
    {  
        if (loginpage == 3)  
        {  
            document.write("<OPTION SELECTED  
            VALUE=3>Update Account Details</OPTION>"); else  
  
            document.write("<OPTION VALUE=3>Update Account  
            Details</OPTION>");  
        }  
    }  
}  
  
// -->  
  
</script>  
  
</SELECT>  
  
</TD></TR>
```


Glossary

A

ACD

See Automatic call distribution.

administrator

A user who is responsible for the setup and ongoing maintenance of the Symposium WebResponse Server.

agent

A person who is responsible for handling customer transactions.

agent login ID

A unique identification number assigned to a particular agent. The agent uses this number when logging in.

API

See application program interface.

application program interface

A set of routines, protocols, and tools that programmers use to develop software applications. APIs simplify the development process by providing commonly used programming procedures.

Automatic call distribution

A means of automatically distributing an organization's incoming calls among a number of answering positions (ACD agents). Automatic call distribution is useful in operations where callers want a service rather than a specific person. Calls are serviced in the order they arrive and are distributed so that the workload at each answering position is approximately equal.

B

blended call center

A call center which uses telephony, web traffic, or other media to handle incoming customer requests.

C

Calling Line Identification

An optional service that identifies the telephone number of the caller. This information can then be used to route the call to the appropriate agent or skillset. The caller's telephone number can also be displayed on a phoneset.

CDN

See controlled directory number.

CLAN

See Customer local area network.

CLID

See Calling Line Identification.

client

The part of a client/server architecture that runs on a personal computer or workstation and relies on a server to perform some operations. For example, an e-mail client is an application that enables you to send and receive e-mail.

computer telephony integration

The use of computer technology to enhance the telephony switch capability.

controlled directory number

A special directory number that allows incoming calls to be queued at a CDN when they arrive at the switch. Messages regarding these calls are sent to the Symposium WebResponse Server.

CTI

See computer telephony integration.

Customer local area network

The LAN to which your corporate services and resources connect. The Symposium WebResponse Server and client both connect to the CLAN. Third-party applications that interface with the server also connect to this LAN.

D

Data Miner

A component of the DTH that scans the database for any new unprocessed transactions. Once the Data Miner finds a new transaction, it creates a TAPI call to the switch. The TAPI call, containing both the original web request and the DTH-added data is then blended into the call center's existing ACD call traffic. The call can then be presented to the appropriate agents' phoneset or PC.

DBMS

Database Management System

Dialed Number Identification Service

An optional service that allows the system to identify the phone number dialed by the incoming caller. Agents can receive calls from customers calling in on different DNISs, and tailor their responses according to the DNIS.

directory number

The number that identifies a phoneset on a switch. The directory number (DN) could be a local extension (local DN), a public network telephone number, or an automatic call distribution directory number (ACD-DN).

DMS-100

Digital Multiplex Switch

DN

See directory number.

DNIS

See Dialed Number Identification Service.

dongle

A hardware device used to verify ownership of Nortel Networks software applications.

DTH

See Dynamic Transaction Handler.

Dynamic Transaction Handler

The software component of the Symposium WebResponse Server that is responsible for managing customer requests over the Internet. DTH essentially converts web-based transaction information into ACD call data that the Symposium Call Center Server can process.

E**ELAN**

See embedded local area network.

embedded local area network

A dedicated Ethernet TCP/IP LAN connecting the Symposium Call Center Server and the switch.

Ethernet

A widely used LAN protocol that uses a bus topology and supports data transfer rates of 10 Mbps.

I**IIS**

See Internet Information Server.

Internet Information Server

The Microsoft web server that allows you to publish and host HTML pages, active server pages, and other applications.

IP address

Internet Protocol address. An identifier for a computer or device on a TCP/IP network. Networks use the TCP/IP protocol to route messages based on the IP address of the destination. The format of an IP address is a 32-bit numeric address written as four numbers separated by periods. Each number can be zero to 255. For example, 1.160.10.240 could be an IP address.

L**LAN**

See Local area network.

Local area network

A computer network that spans a relatively small area. Most LANs connect workstations and personal computers and are confined to a single building or group of buildings.

M**M1**

Meridian 1 switch

O**object linking and embedding**

A compound document standard that enables you to create objects with one application and then link or embed them in a second application.

ODBC

See Open Database Connectivity.

OLE

See object linking and embedding.

Open Database Connectivity

A Microsoft-defined database application program interface (API) standard.

P**PC**

Personal computer. A computer with an architecture that is compatible with the IBM PC.

personal directory number

A DN on which an agent can be reached directly, usually for private calls.

phoneset

The physical device, connected to the switch, to which calls are presented. Each agent and supervisor must have a phoneset.

priority

An attribute of a skillset assignment that determines the order in which calls from different skillsets will be presented to an agent. When an agent becomes available, calls may be waiting for several of the skillsets to which the agent belongs. The server presents the call queued for the skillset for which the agent has the highest priority.

protocol

A standard format used for communication between two devices. The protocol determines the type of error checking to be used, the data compression method (if any), how the sending device will indicate that it has finished sending a message, and how the receiving device will indicate that it has received a message.

S**SCM**

See Service Control Manager.

screen pop

An application launched on an agent's computer screen when information is received from a host application.

server

A computer or device on a network that manages network resources. Examples of servers include file servers, print servers, network servers, and database servers.

service

A process that adheres to a Windows NT structure and requirements. A service provides system functionality.

Service Control Manager

A Windows NT process that manages the different services on the PC.

service-level

The percentage of incomings calls answered within a specified number of seconds.

skillset

A group of capabilities or knowledge required to answer a specific type of call.

supervisor

A user who manages a group of agents.

switch

The hardware that receives phone calls and provides connections to phonesets.

SWRS

Symposium WebResponse Server

T**TAPI**

See Telephony Application Programming Interface.

TCP/IP

Transport Control Protocol/Internet Protocol. The communication protocol used to connect devices on the Internet. TCP/IP is the standard for transmitting data over networks.

telephony

The science of translating sound into electrical signals, transmitting them, and then converting them back to sound. The term is used frequently to refer to computer hardware and software that perform functions traditionally performed by telephone equipment.

Telephony Application Programming Interface

An industry-standard API interface for performing telephony operations, defined by Microsoft.

threshold

A value for a statistic at which system handling of the statistic changes.

Token Ring

A PC network protocol developed by IBM. A Token Ring network is a type of computer network in which all the computers are arranged schematically in a circle.

transaction

A request from a customer, usually in the form of a web page or e-mail, that is captured by the Symposium WebResponse Server and processed by an agent.

W**WAN**

Wide area network. A computer network that spans a relatively large geographical area. Typically, a WAN consists of two or more local area networks (LANs). The largest WAN in existence is the Internet.

web browser

Software, such as Internet Explorer, used to display HTML pages.

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